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State of the Nation Spotlight on Tourism

Portia Morgan

July 2019



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Trust is the foundation of all human connections – from intimate relationships to everyday business transactions

But it's **Distrust** where our deepest fears, pain and betrayal surface

The shock of discovering we were foolish to trust too much

Trust is the foundation of all human connections

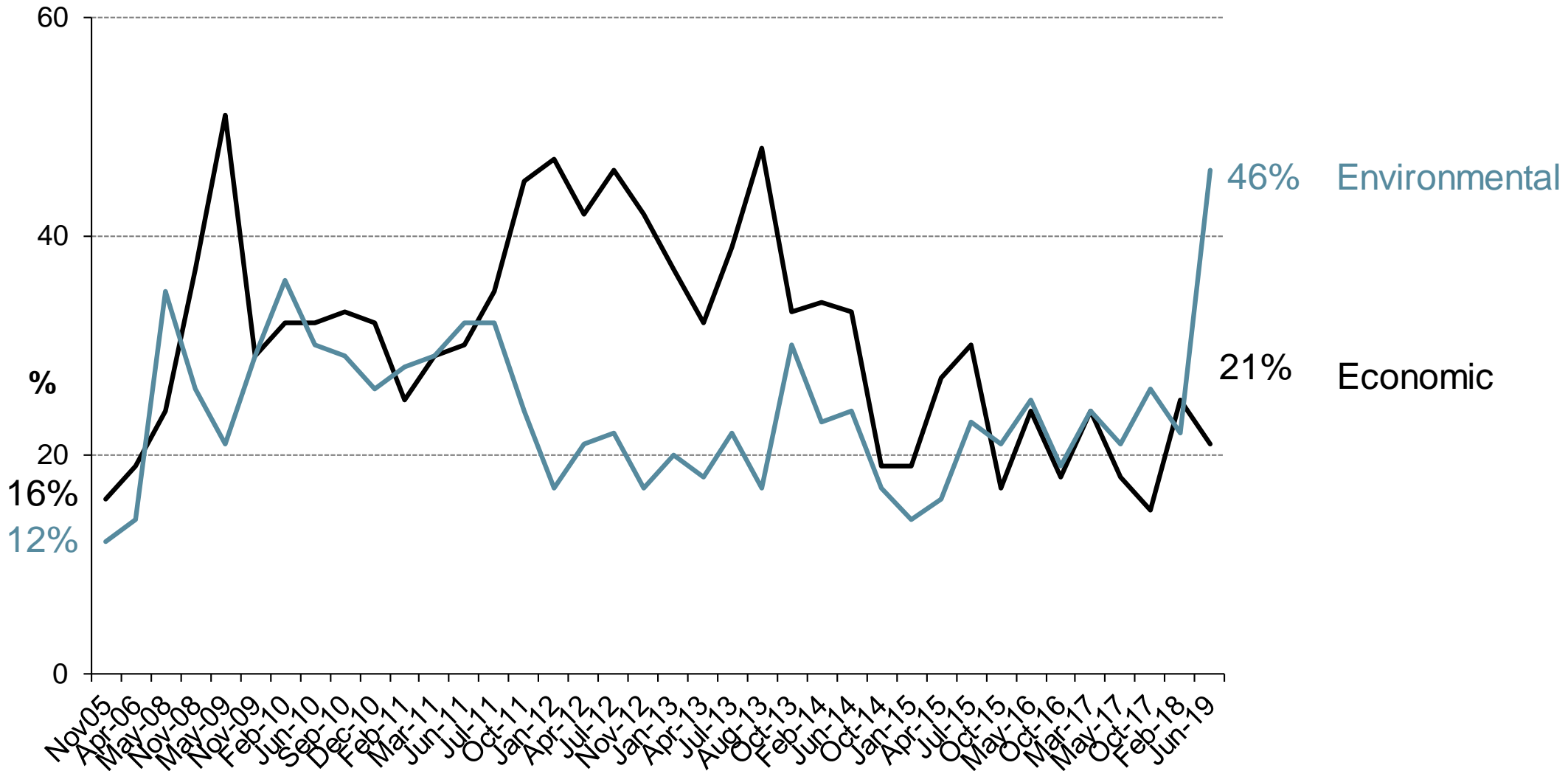
- Making an online purchase
- Using Uber
- Taking a flight
- Going on a date
- Providing credit card details over the phone
- Opening a door to strangers
- Getting married
- Believing the news

But **distrust** destroys social cohesion - instantly

Once we discover we were foolish to trust too much, it **prevents** us from:

- Making an online purchase
- Booking an Uber
- Planning a flight
- Going on a date
- Giving credit card details over the phone
- Opening the door to a stranger
- Getting married
- Believing the news

Most Important Problems Facing the World

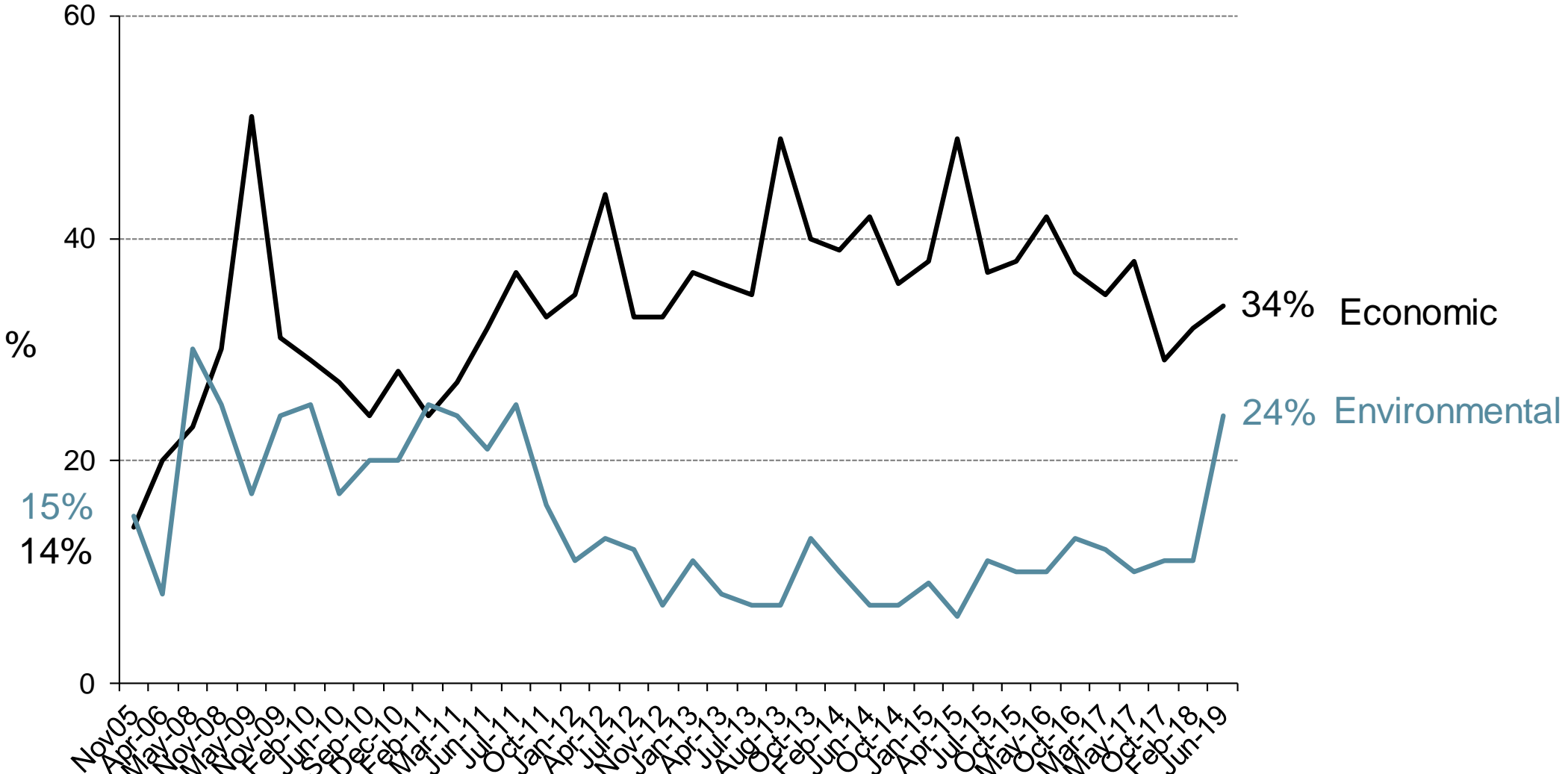


Base: Australian population aged 18+

Source; Roy Morgan nation-wide telephone survey June 12-13, 2019 (n=638).



Most Important Problems Facing Australia



Base: Australian population aged 18+

Source; Roy Morgan nation-wide telephone survey June 12-13, 2019 (n=638).



Tourism Matters

'Tourism is potentially a country's most valuable 'New Age' export industry'

Key Exports: Iron Ore, Coal, Gas & Education

Rank	Product	\$AUD Bn 2012-13	\$AUD Bn 2017-18	\$AUD Bn (%) Change
1.	Iron ore	\$57.1	\$61.4	+\$4.3 (+7%)
2.	Coal	\$38.6	\$60.4	+\$21.8 (+56%)
3.	Education	\$14.5	\$32.4	+\$17.9 (+123%)
4.	Natural gas	\$14.3	\$30.9	+\$16.6 (+116%)
5.	Tourism	\$12.6	\$21.6	+\$9.0 (+71%)
6.	Gold	\$15.3	\$19.3	+\$4.0 (+26%)
7.	Aluminium	\$5.6	\$9.4	+\$3.8 (+68%)
8.	Beef	\$5.1	\$8.0	+\$2.9 (+57%)
9.	Crude Oil	\$9.7	\$6.5	-\$3.2 (-33%)
10.	Copper	\$5.4	\$5.7	+\$0.3 (+6%)

Source dfat.gov.org

Australia's Biggest Export Markets (2012-13 cf. 2017-18)

Rank	Country	\$AUD Bn 2012-13	\$AUD Bn 2017-18	\$AUD Bn (%) Change
1.	China	\$84.6	\$123.3	+\$38.7 (+46%)
2.	Japan	\$48.6	\$51.3	+\$2.7 (+6%)
3.	South Korea	\$20.8	\$23.6	+\$2.8 (+13%)
4.	USA	\$14.5	\$21.4	+\$6.9 (+48%)
5.	India	\$13.3	\$21.1	+\$7.8 (+59%)
6.	Hong Kong	\$11.9	\$14.5	+\$2.6 (+22%)
7.	New Zealand	\$10.9	\$14.4	+\$3.5 (+32%)
8.	Singapore	\$10.0	\$13.2	+\$3.2 (+32%)
9.	UK	\$9.4	\$11.8	+\$2.4 (+25%)
10.	Taiwan	\$8.2	\$10.9	+\$2.7 (+33%)

Source dfat.gov.org

New Era for Tourism

Economy

Australia Today



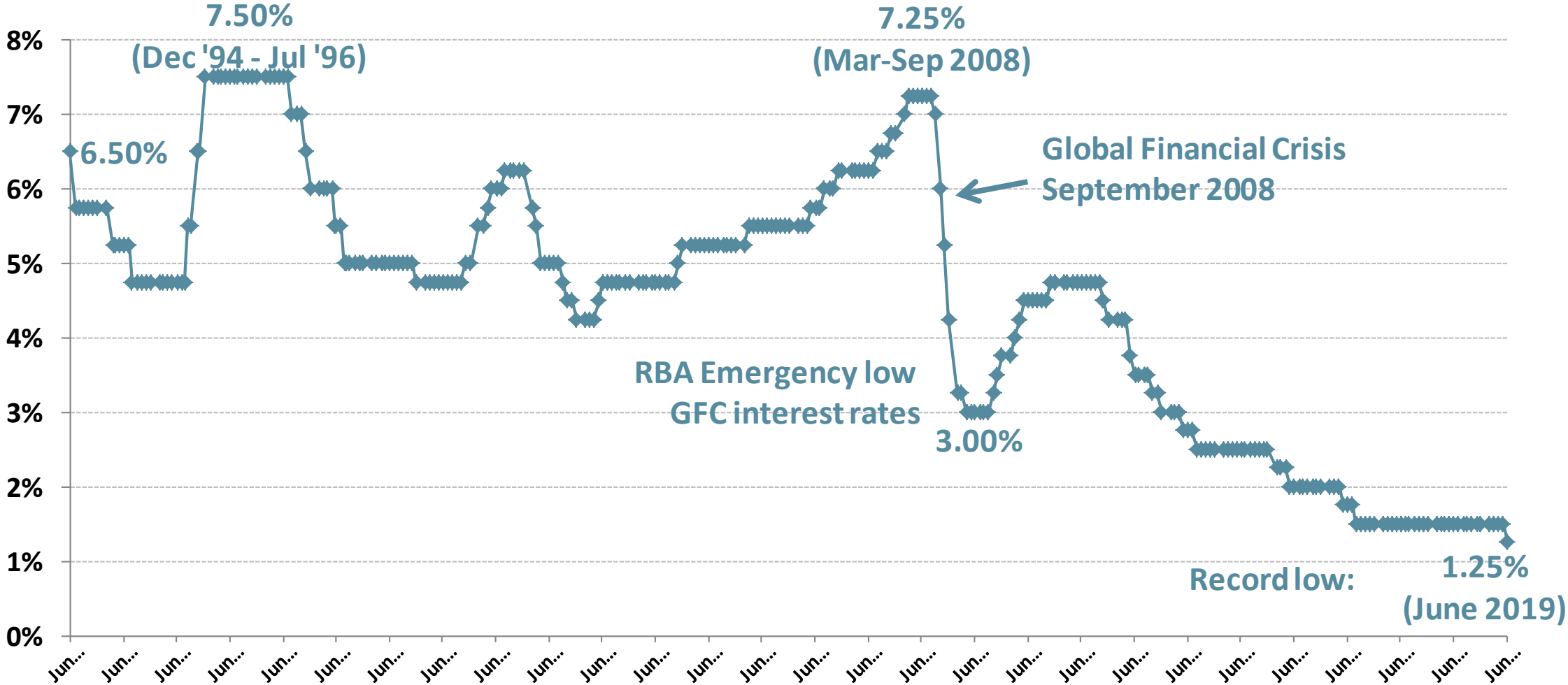
[1] Australian Bureau of Statistics; March 2019

[2] Reserve Bank of Australia; May 2019

[3] Australian Bureau of Statistics; March 2019

[4] Finance.Yahoo.com.au – June 17, 2019

Standard Variable Interest Rates



Source: Reserve Bank of Australia

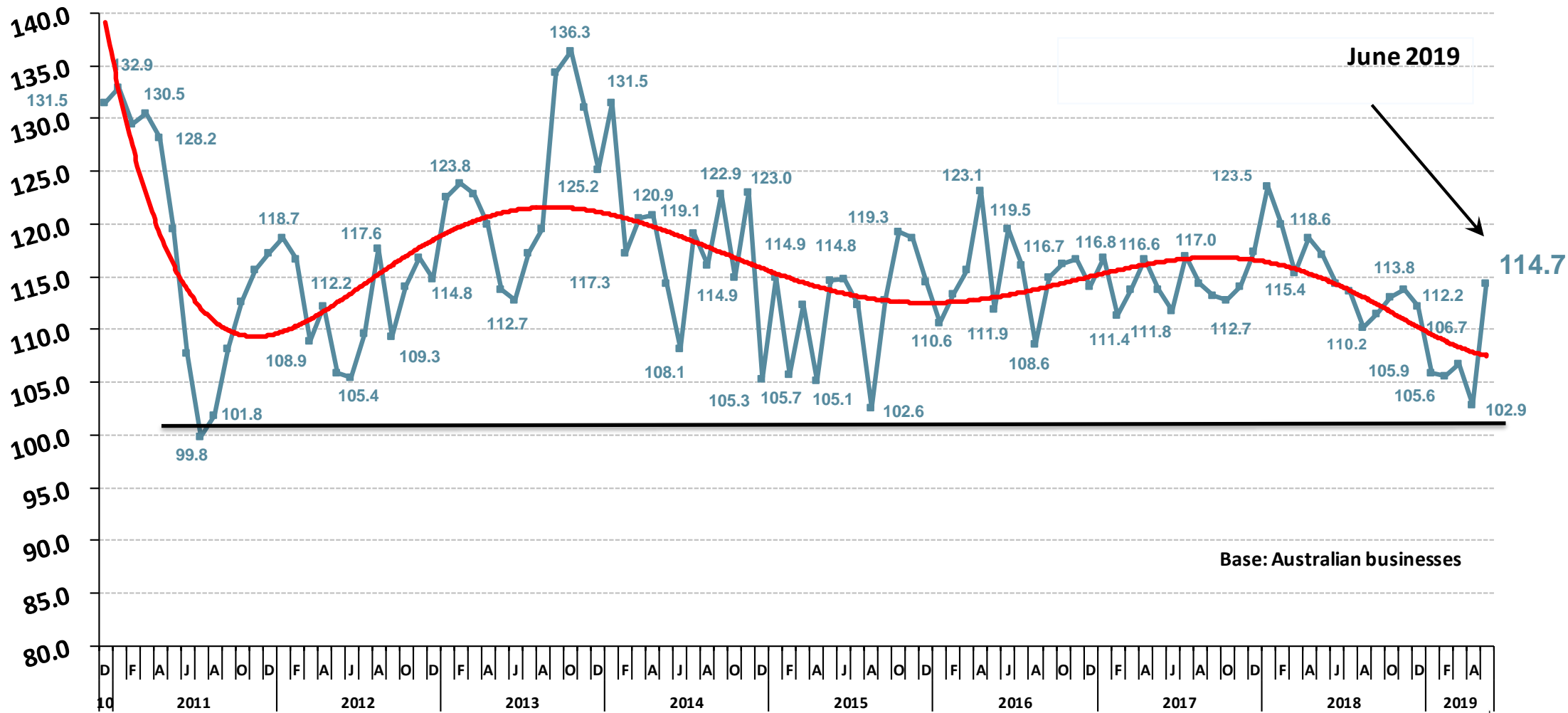
Australia Today



- [1] Roy Morgan Face-to-Face; June 29/30, 2019; Australian population aged 14+
- [2] Roy Morgan Face-to-Face Survey; June 2019; Australian population aged 14+ in Workforce

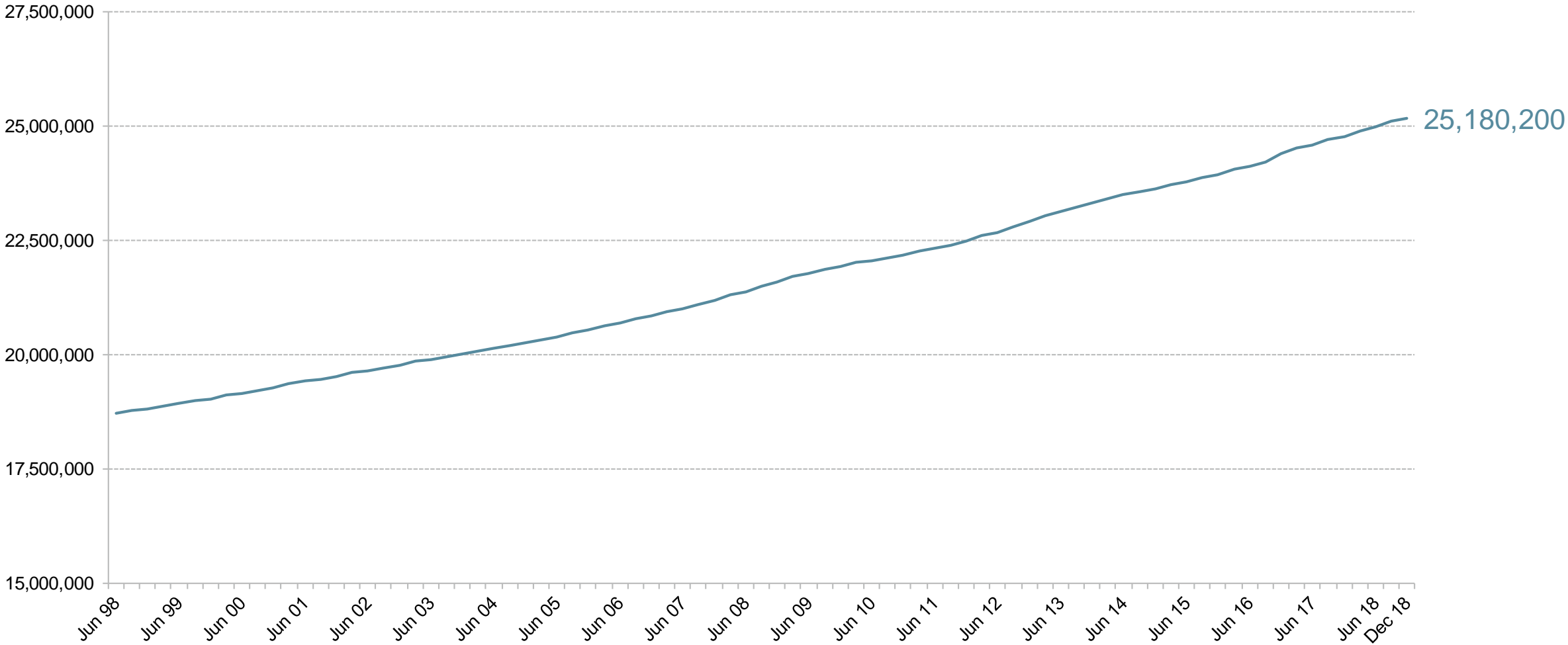
- [3] Roy Morgan Business Single Source; June 2019

Roy Morgan Business Confidence

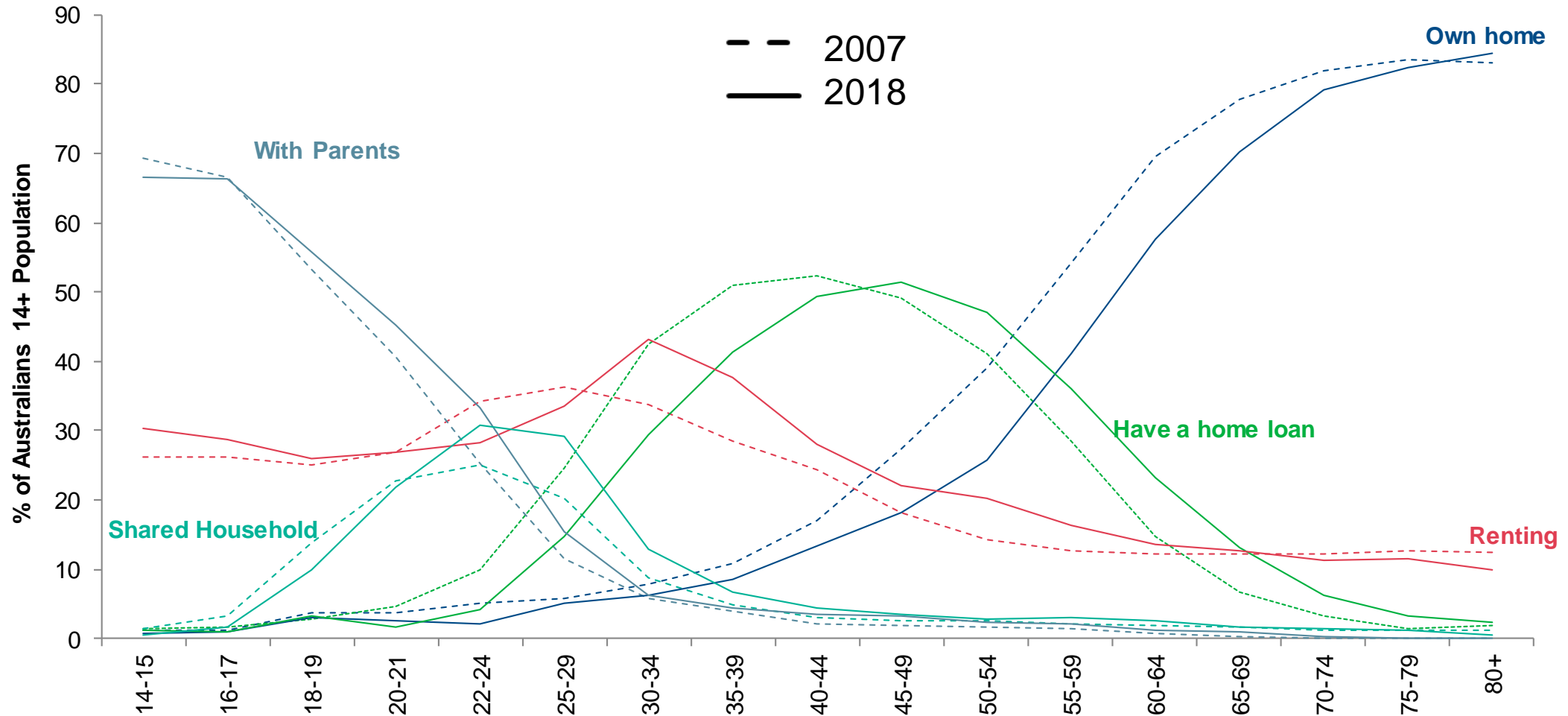


Society

Population Growth - Driven by Immigration



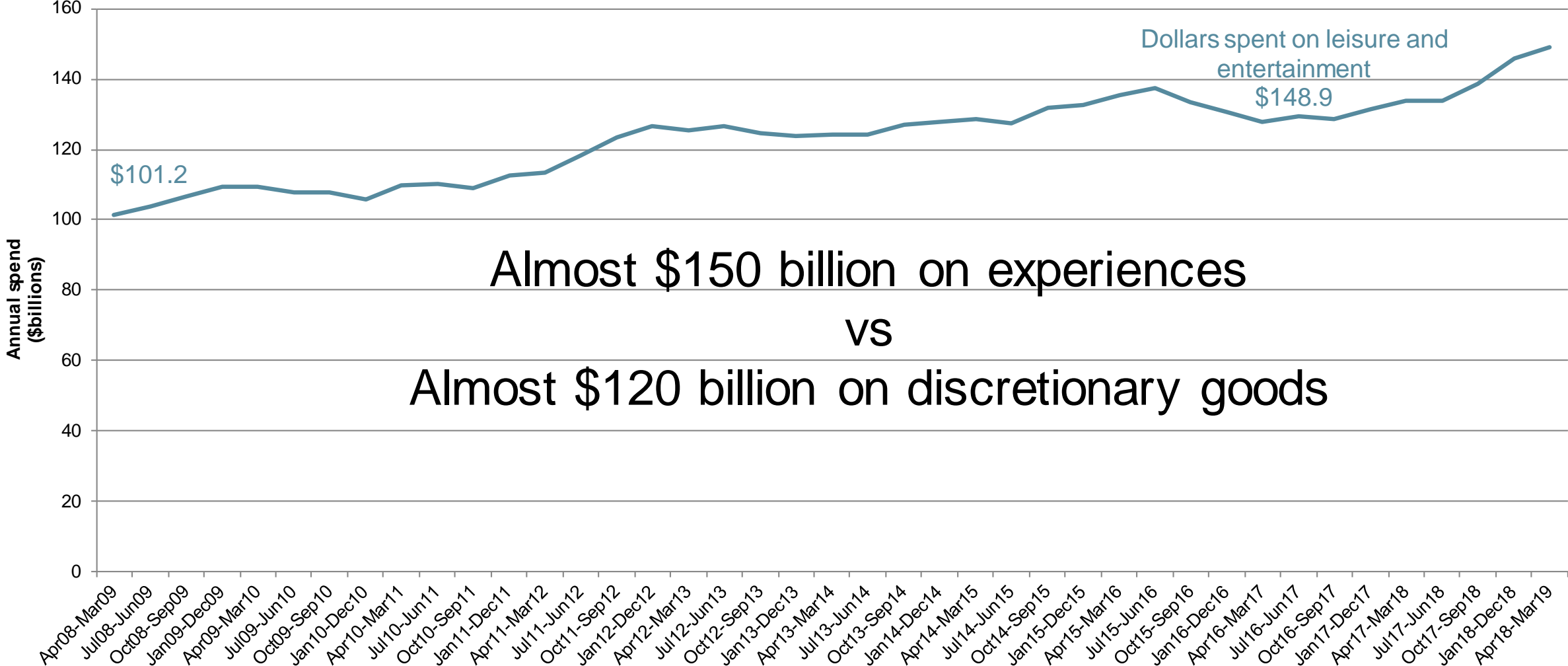
Everything is happening later in life



Source: Roy Morgan Single Source (Australia)

Base: Australian population aged 14+

It's Official: Australia is an experience economy



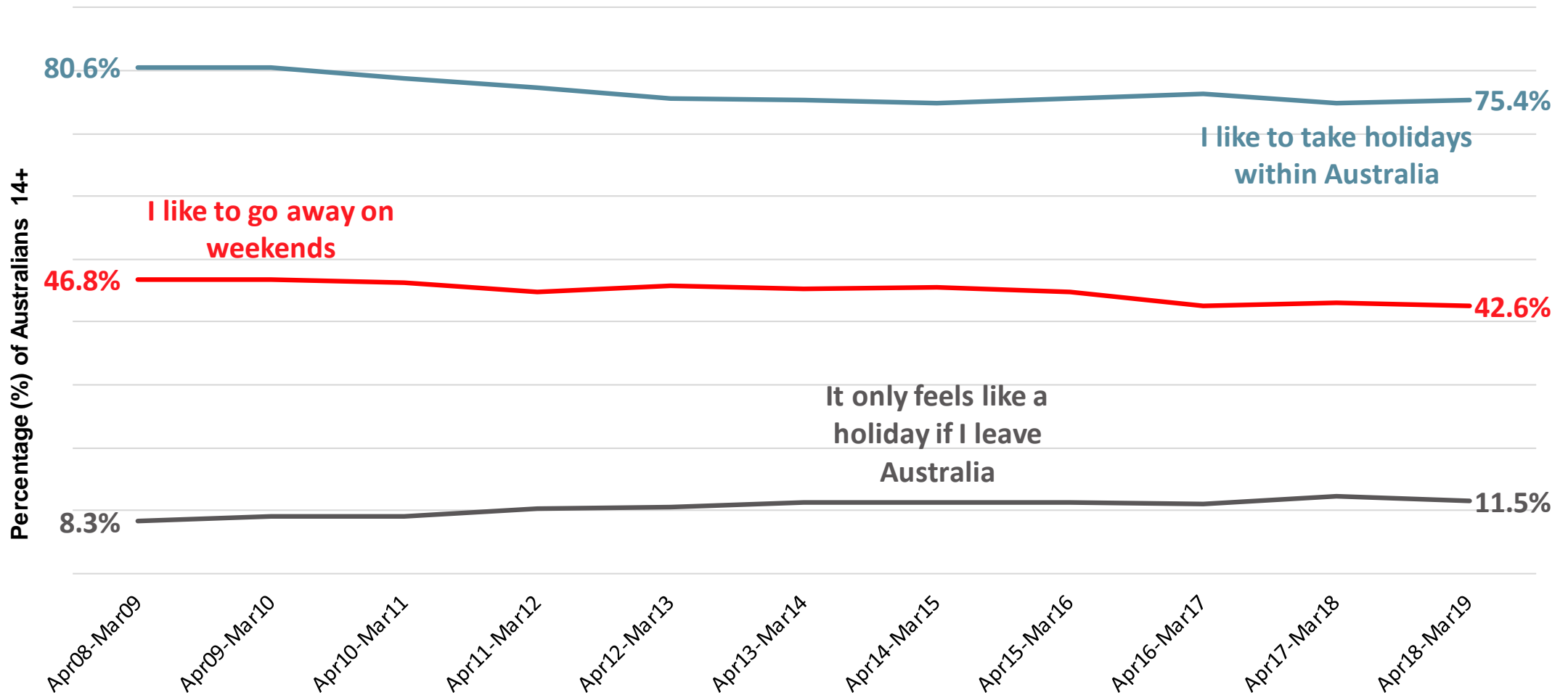
Base: Australian population aged 14+

Source: Roy Morgan Single Source (Australia) April 2008 – March 2019



Holiday Attitudes & Activities

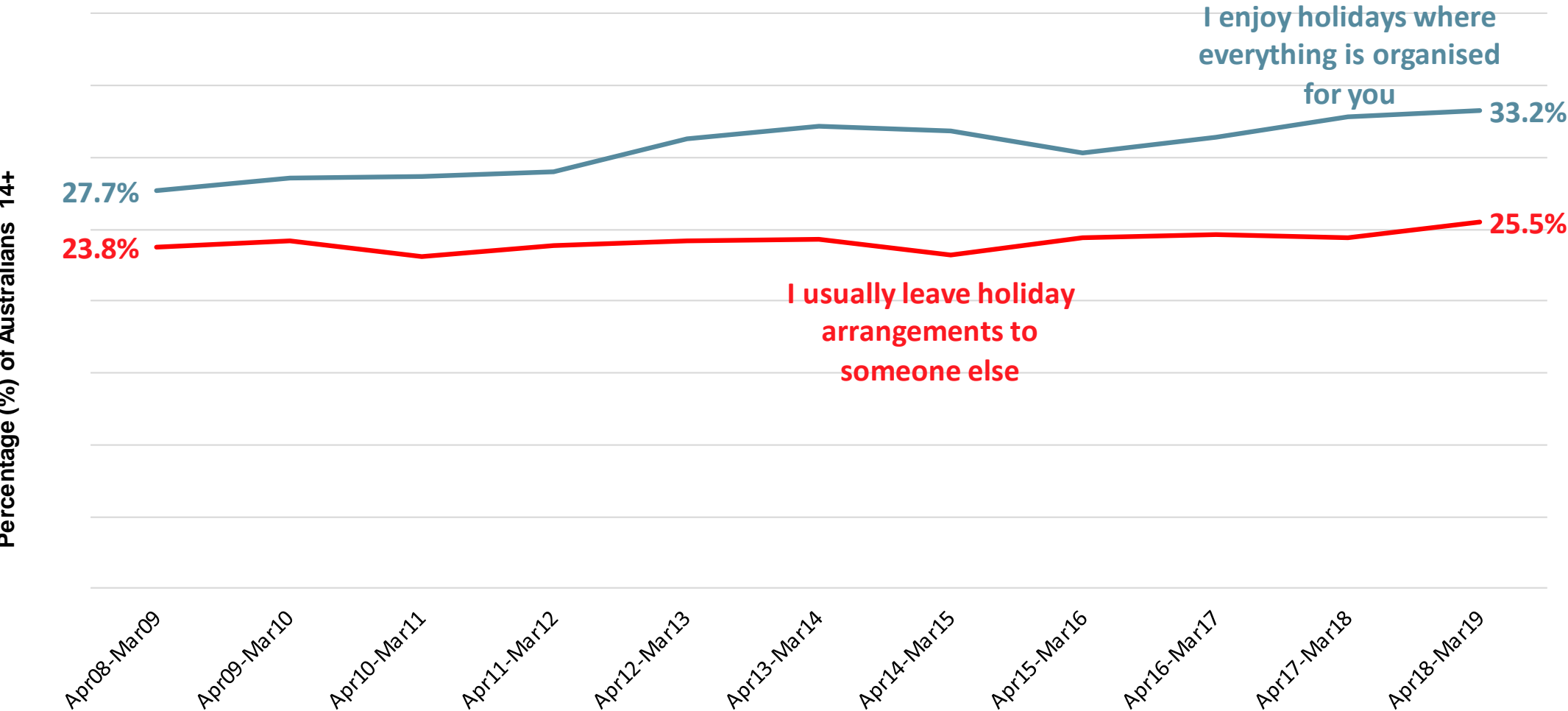
Overseas holidays becoming more desirable, weekend getaways less popular



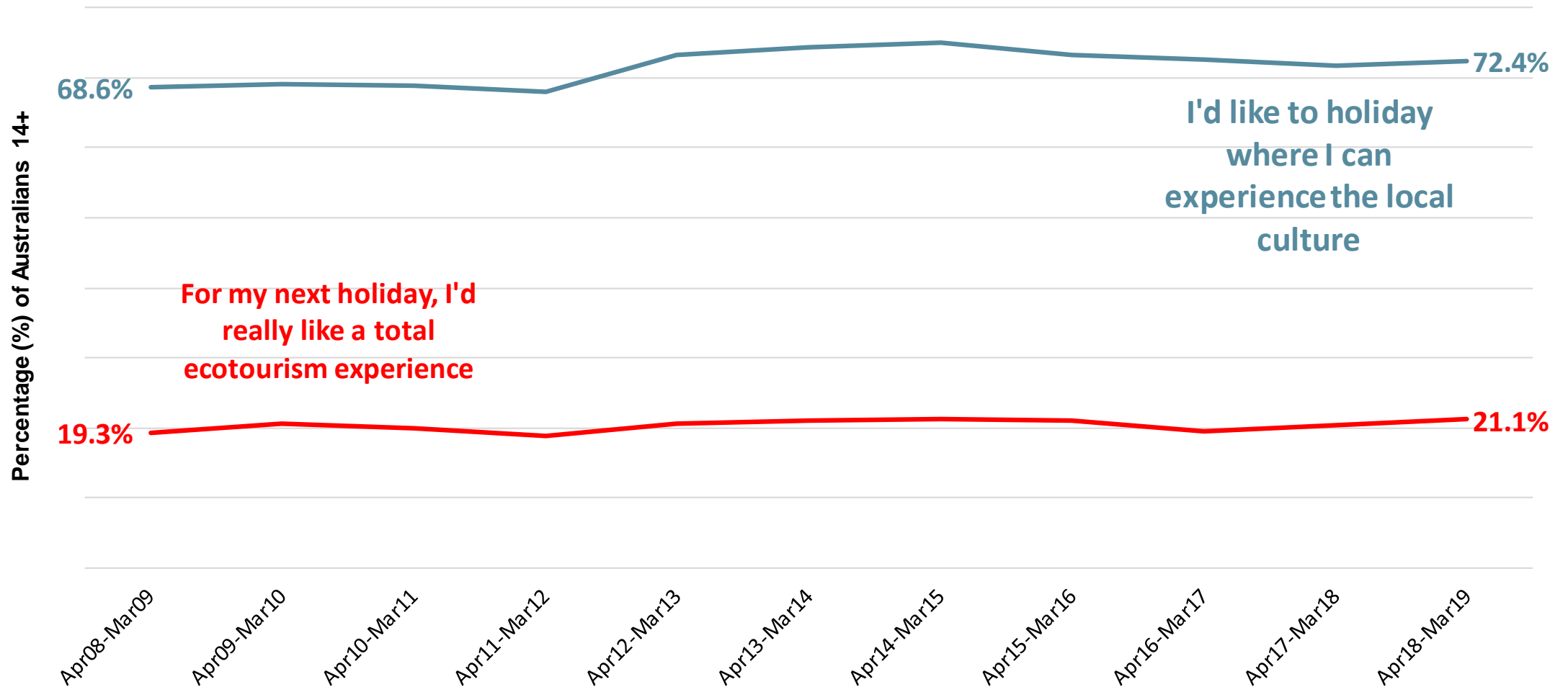
Base: Australian population aged 14+

Source: Roy Morgan Single Source (Australia) April 2008 – March 2019

More people like others to plan their holiday



Trend toward desiring cultural experiences and ecotourism

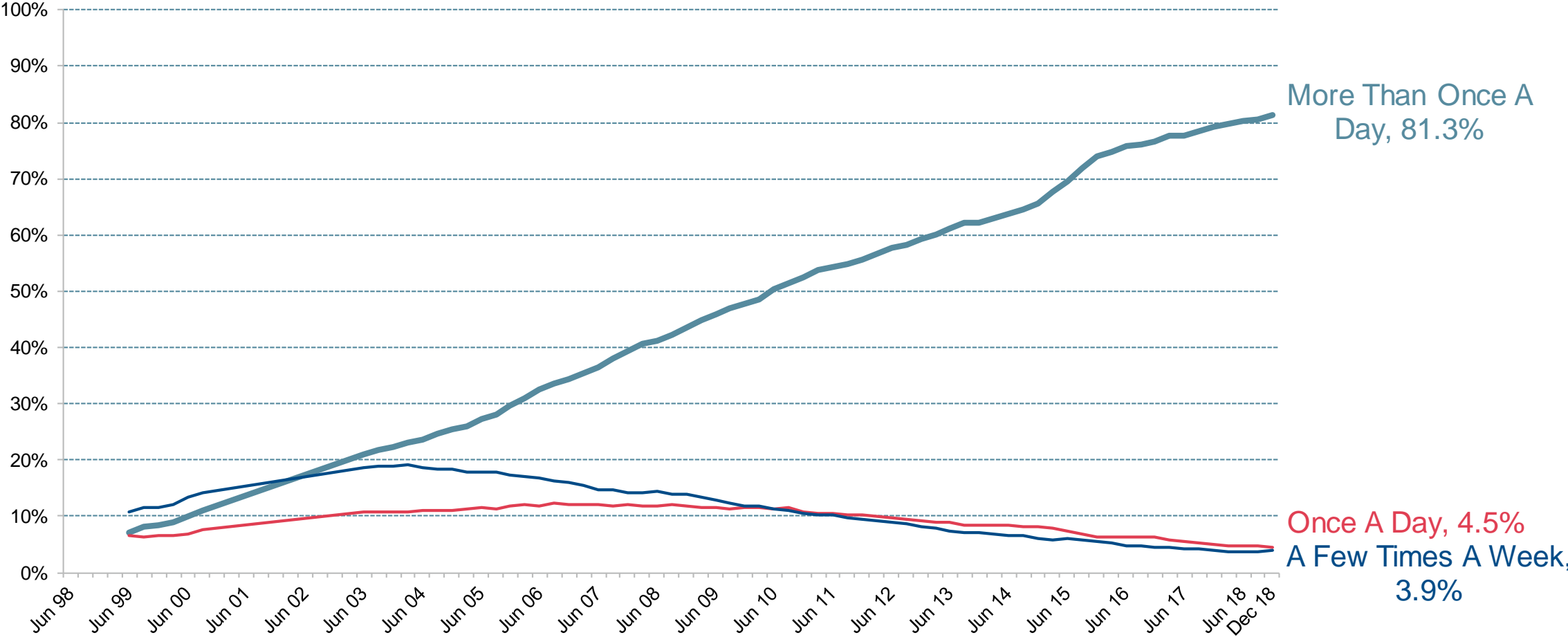


Base: Australian population aged 14+

Source: Roy Morgan Single Source (Australia) April 2008 – March 2019

Technology

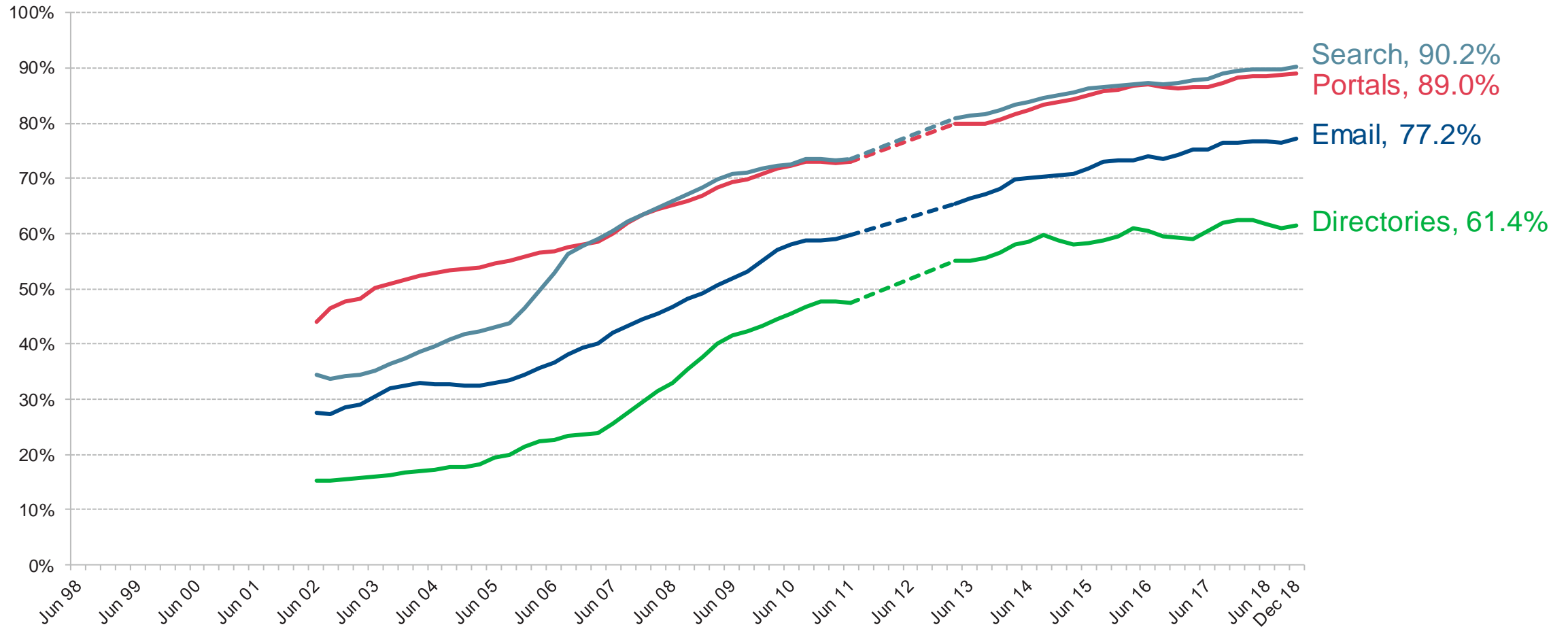
Internet is now ubiquitous



Base: Australian population aged 14+
Source: Roy Morgan; 12 month moving average

Traditional Websites and Search

(visited in an average 4 weeks)



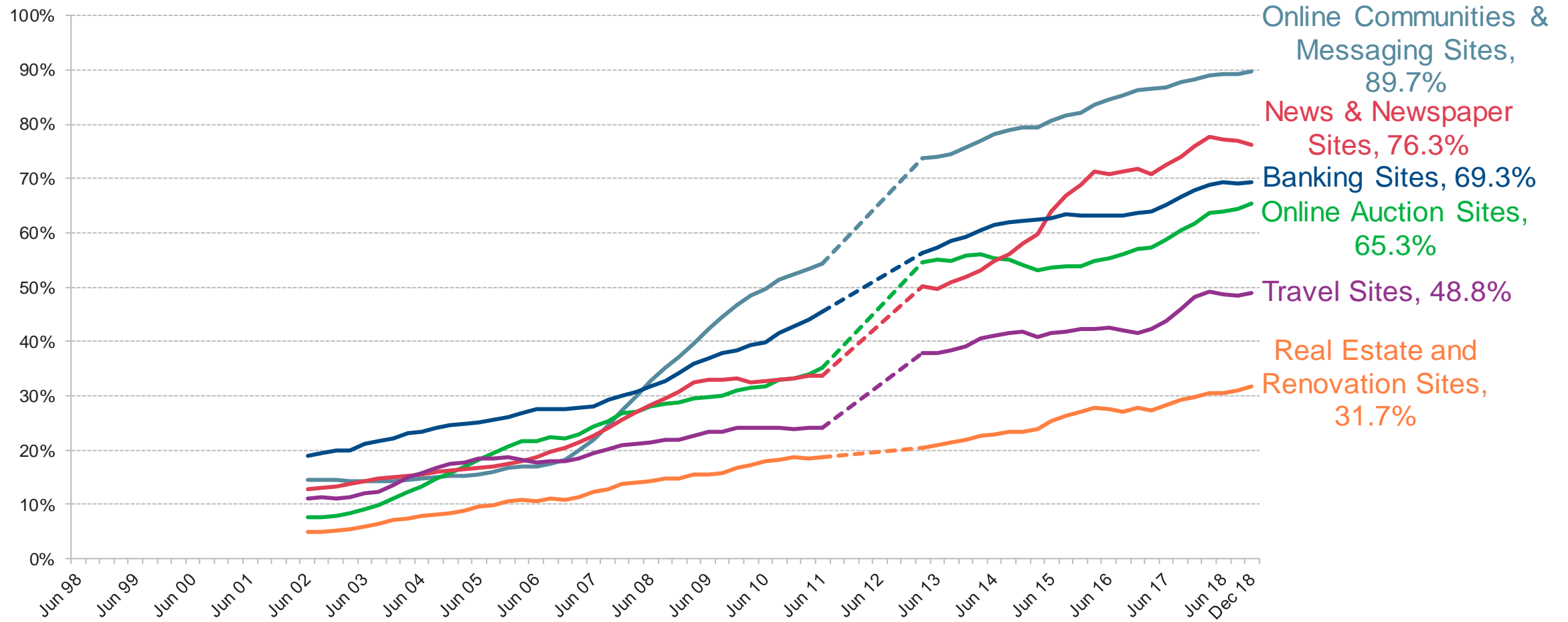
--- Represents a change in methodology from respondent recall to machine based measurement

Base: Australian population aged 14+

Source: Roy Morgan; 12 month moving average

Commercial & Community Websites

(visited in an average 4 weeks)



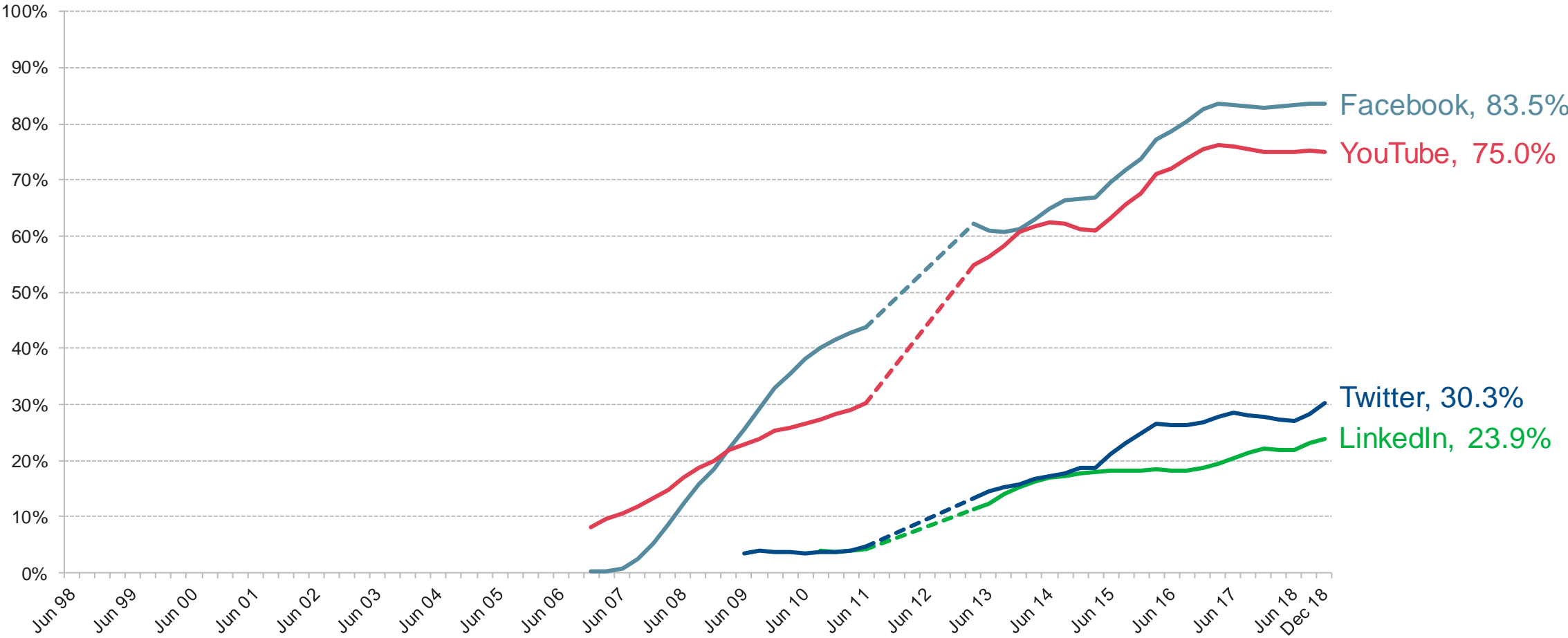
— Represents a change in methodology from respondent recall to machine based measurement

Base: Australian population aged 14+

Source: Roy Morgan; 12 month moving average

Major Online Community Websites

(visited in an average 4 weeks)

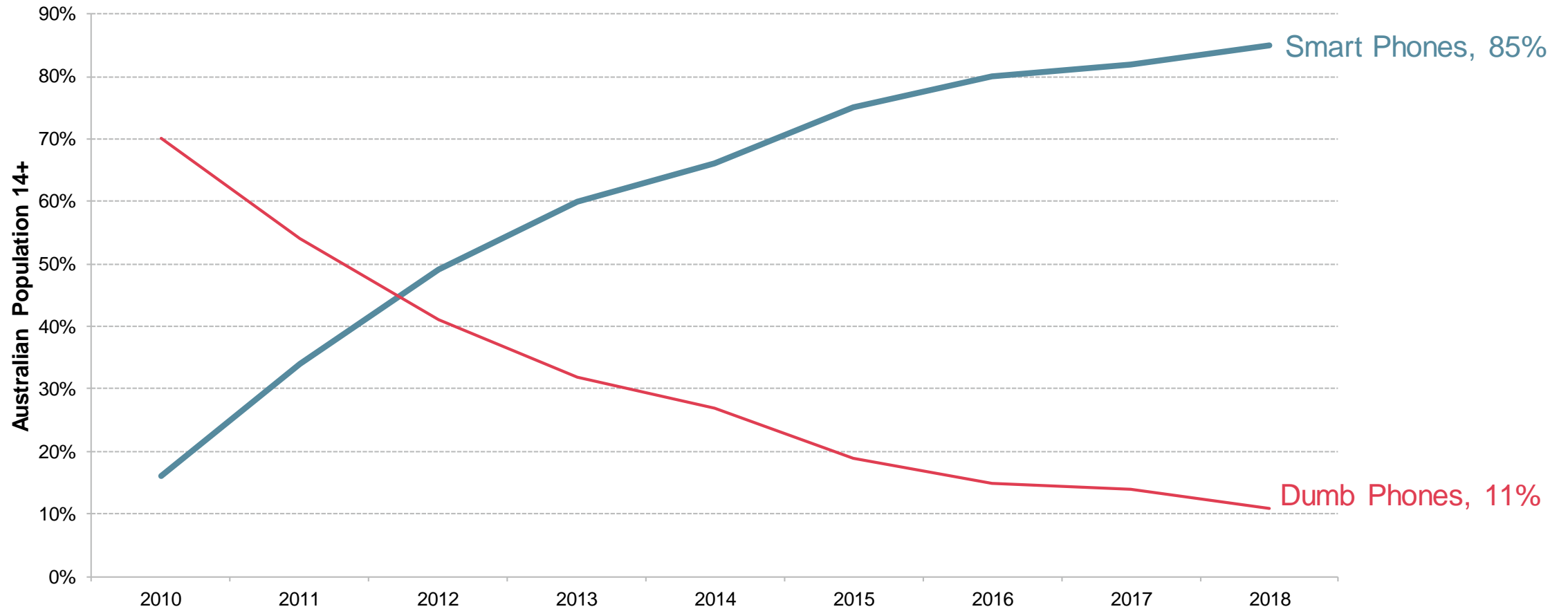


--- Represents a change in methodology from respondent recall to machine based measurement

Base: Australian population aged 14+

Source: Roy Morgan; 12 month moving average

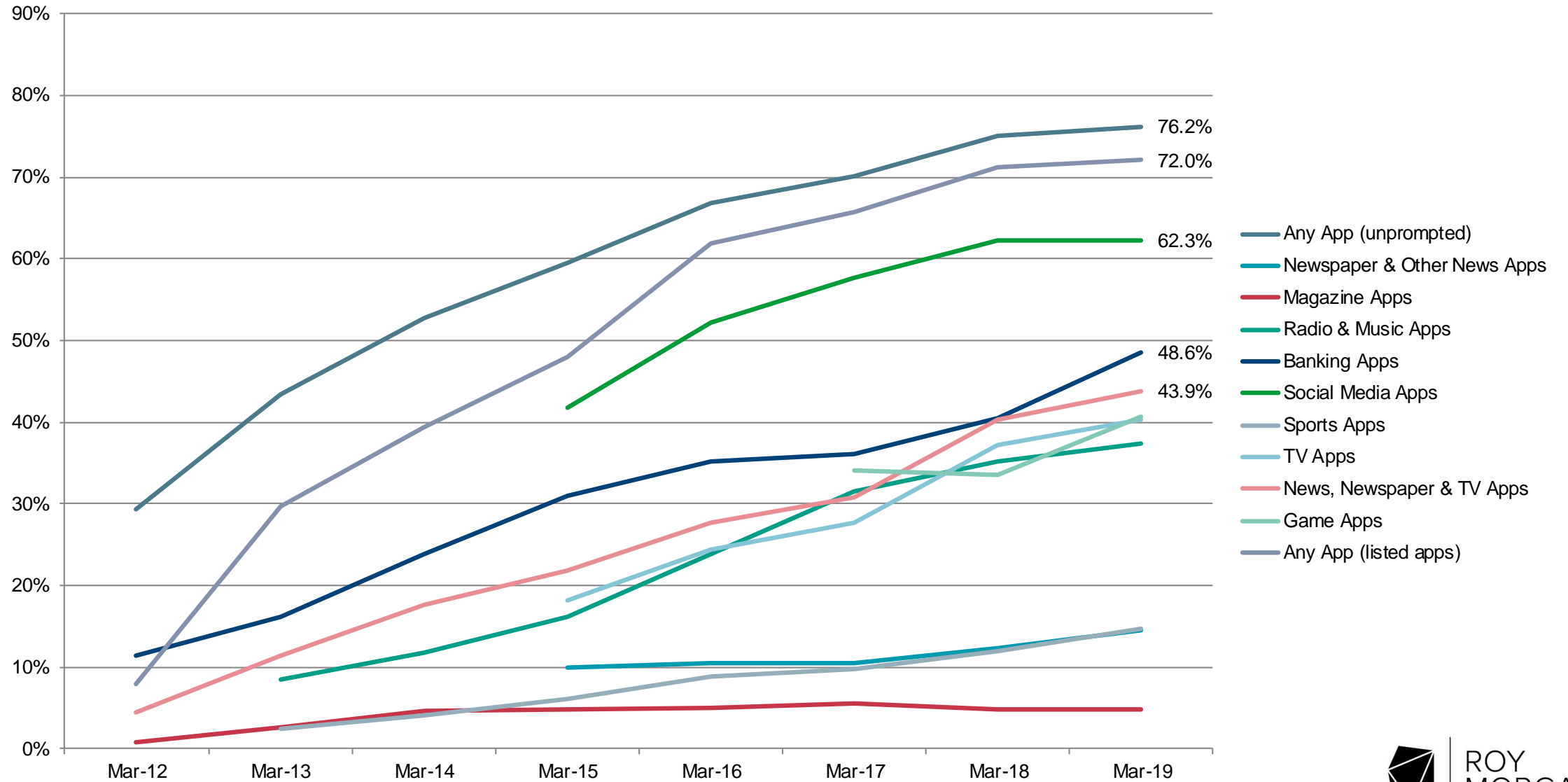
Types of Mobile Phone Used



Base: Australian population aged 14+

Source: Roy Morgan; discrete 12 month average

Apps Ever Downloaded



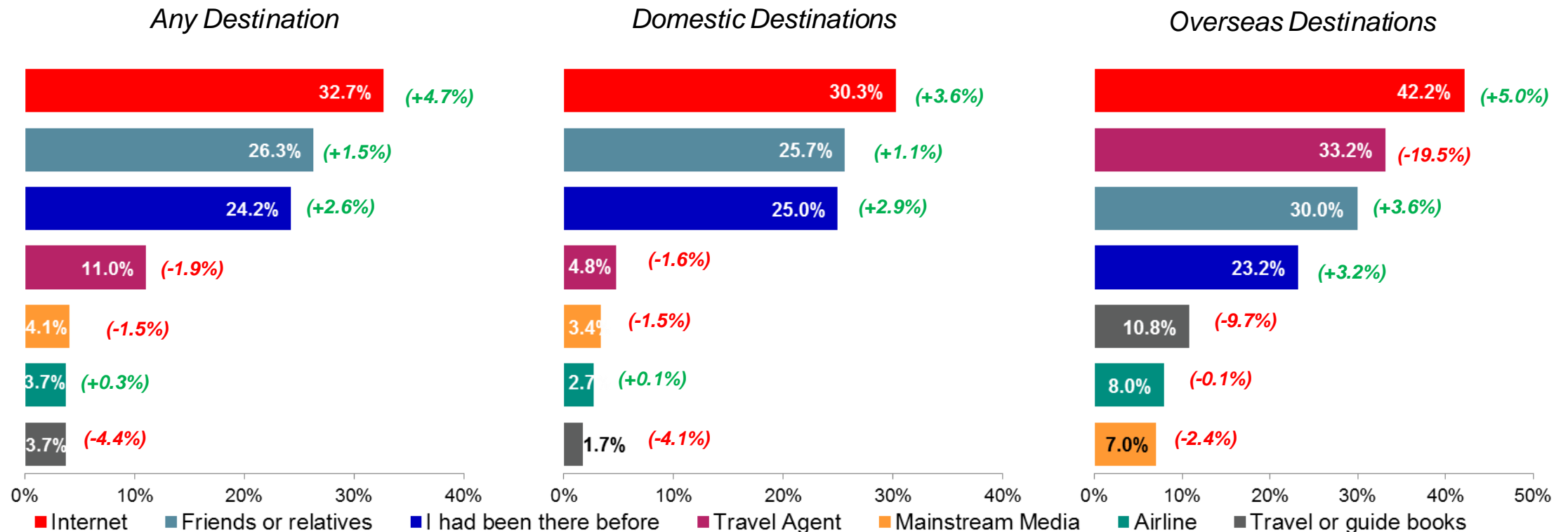
Information and booking

The internet is most instrumental in choosing a destination, especially overseas travel

Word-of-mouth is the second most important tool for domestic travellers, while overseas travellers rely more on travel agents (though Travel Agent have lost traction overtime).

Places obtained information when choosing destination of last trip

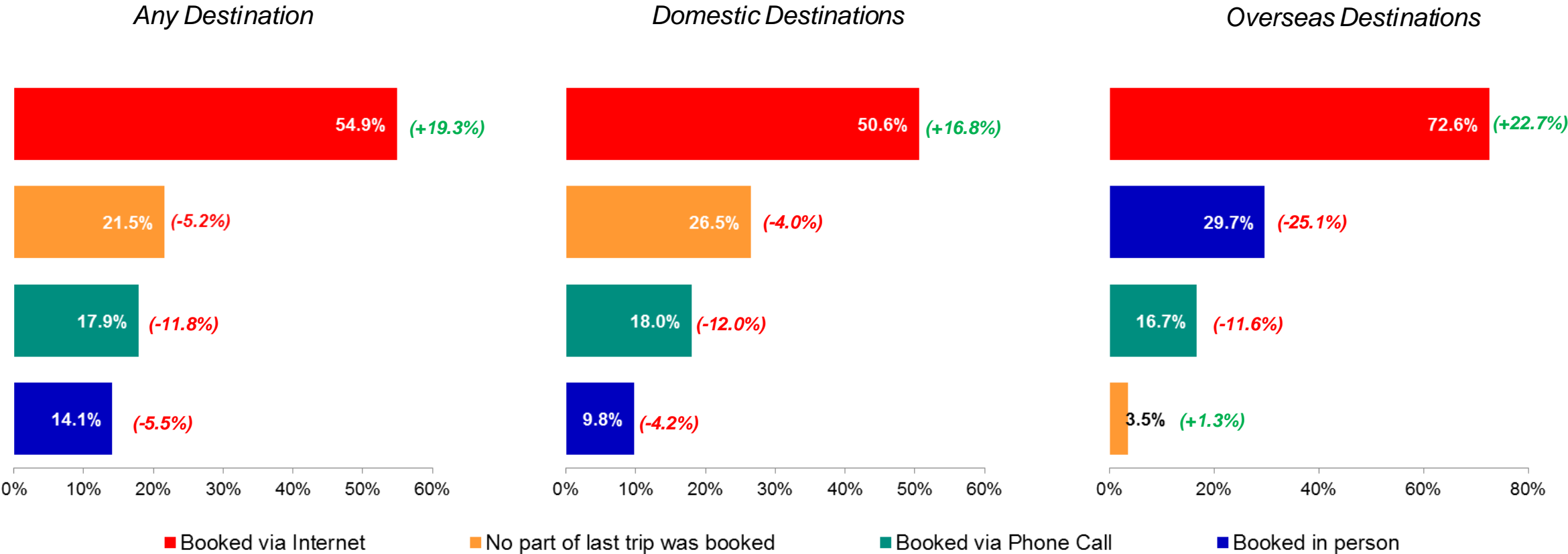
Figures in brackets represent 'change since Dec '08'



Internet booking is on a continuous growth spree, while 'In person' booking is more popular among overseas travellers

Booking Methods Used for Last Trip

Figures in brackets represent 'change since Dec '08'



Source: Roy Morgan Single Source (Australia) Jan '18 to Dec '18
 Base: Australian population aged 14+

Half of the domestic (48.2%) and overseas travellers (50.4%) have used online agencies, with Booking.com being used by 1 in 5

Top 5 Travel Agents / Tour Operators (L12M) are dominated by online brands

Domestic Travellers

Overseas Travellers

Booking.com 19.2%

 **airbnb** 16.6%

FLIGHT CENTRE® 14.4%

 **tripadvisor®** 10%


webjet.com.au 7.7%

FLIGHT CENTRE® 24.6%

Booking.com 20.8%

 **airbnb** 18.2%

 **tripadvisor®** 11.8%

 **Expedia®** 10.6%

What's happening

Doomsday tourism and climate change: Visiting natural wonders before they disappear

From the Great Barrier Reef to majestic glaciers, increasing numbers of tourists are vacationing in places expected to succumb to climate change before it's too late.



Hawaii's Waikiki Beach could soon be underwater because of climate change. Lawmakers are fighting to preserve it

By CNN staff | 4 weeks ago

NEWS CLIMATE 06 MAY 2019

People are flocking to see melting glaciers before they're gone – bringing both benefit and harm

More tourists mean more business and more climate change awareness but visiting thawing destinations can be a double-edged sword. Marcello Rossi reports.



Should short-haul flights be banned? Climate change is a major issue in elections in Europe and Australia.



A British Airways aircraft at London Heathrow Airport. (Ben Stansall/AFP/Getty Images)

By Rick Noack
May 17

QANTAS OPERATES WORLD'S FIRST ZERO WASTE FLIGHT

Qantas passengers in world-first 'zero waste' flight

PUBLISHED ON 8TH MAY 2019 AT 10:34

[Facebook](#) [Twitter](#) [Google+](#)

The first-ever commercial flight to produce no landfill waste took to the skies this morning. Qantas' plan to cut 100 million single-use plastics by end-2020 and eliminate 75 per cent end-2021.



Qantas is trialling a move it says will cut 100 million single-use plastics a year. (AAP)



Introducing Qantas's First Landfill-Free Flight

Mini Vegemite servings were out and compostable crop starch cutlery was in as Qantas trialled a move it says will cut 100 million single-use plastics a year.

UPDATED 6 DAYS AGO

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May 08, 2019
By Alex Greig

Share this article

Philippines' Boracay Island Tackles Overtourism With Bans on Cruise Ships in Peak Seasons

Maria Stella F. Arnaldo, Skift - Apr 25, 2019 8:00 am



Dutch Tourism Board to stop promoting popular areas due to overtourism

Kellie Paxian
May 08, 2019 7:58 am 🔥 705



Europe's Vacation Hot Spots Have a Message for Tourists: Sorry, We're Full



Overtourism puts ecotourism on the map

Share 92



Sal Salis Ningaloo Reef is a beach-side safari camp nestled in the dunes of the Cape Range National Park, Western Australia.

Poppy Johnston | 11 December 2018

The unthinking tourist might be a thing of the past if people such as Rod Hillman continue to drive change.

Faroe Islands holidays

Tim Ecott

Wed 8 May 2019 15:30 AEST

323

Sustainable tourism: why the Faroe Islands closed for maintenance



EU cities join forces for more sustainable tourism

By Beatriz Ríos | EURACTIV.com

May 14, 2019



Is it worth it to fly an ultra-low-cost airline?

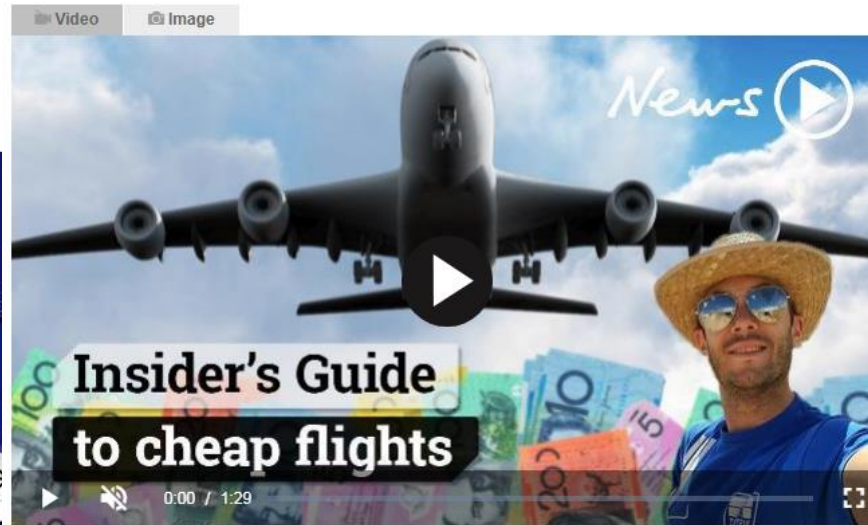
Mike Arnot, CNN • Published 24th April 2019



Scot launches Deal of the Decade sale with \$299 flights to Europe

They're calling it the Deal of the Decade — and that's not just a cute slogan. The latest airline sale has fares to Europe from Australia for less than \$300.

ESCAPE FEBRUARY 19, 2019 9:58AM



Insider's Guide to cheap flights

Just when you thought you'd missed out on a cheap flight to Europe this year, along comes a deal so jaw-dropping it changes everything.

Compare Flight Prices

- 1 CheapTickets
- 2 cheapOair
- 3 Expedia
- 4 hipmunk
- 5 hotwire
- 6 ORBITZ
- 7 asaptickets
- 8 travelocity
- 9 SmartFares
- 10 OneTravel

Find a Flight ▶

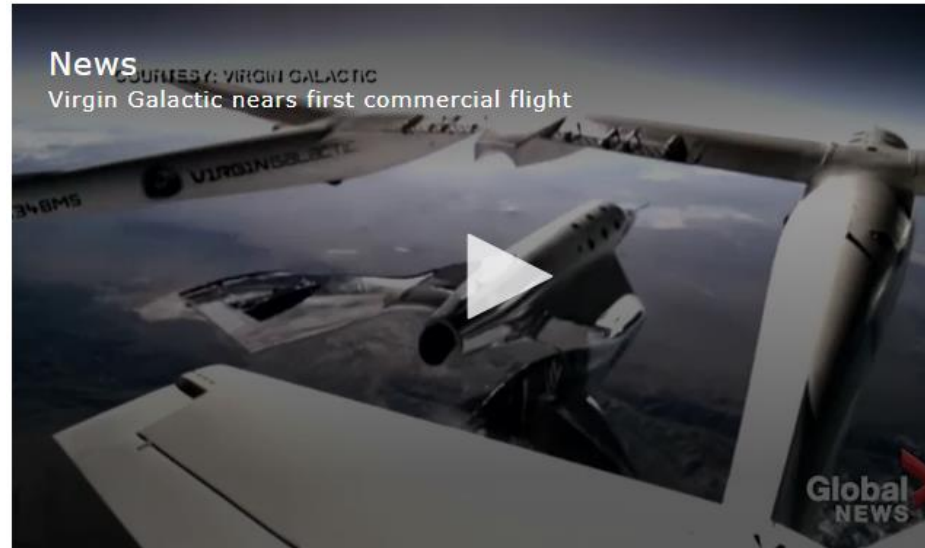
Space Tourism Market Size Emerging Trends & Forecast Report

By Joshua Carter - May 21, 2019 👁 27 💬 0



Space tourism closer to reality as Virgin Galactic nears first commercial flight

By Morgan Lee The Associated Press



WATCH: Billionaire Richard Branson is moving Virgin Galactic's winged passenger rocket and employees to a commercial launch and landing facility in southern New Mexico.

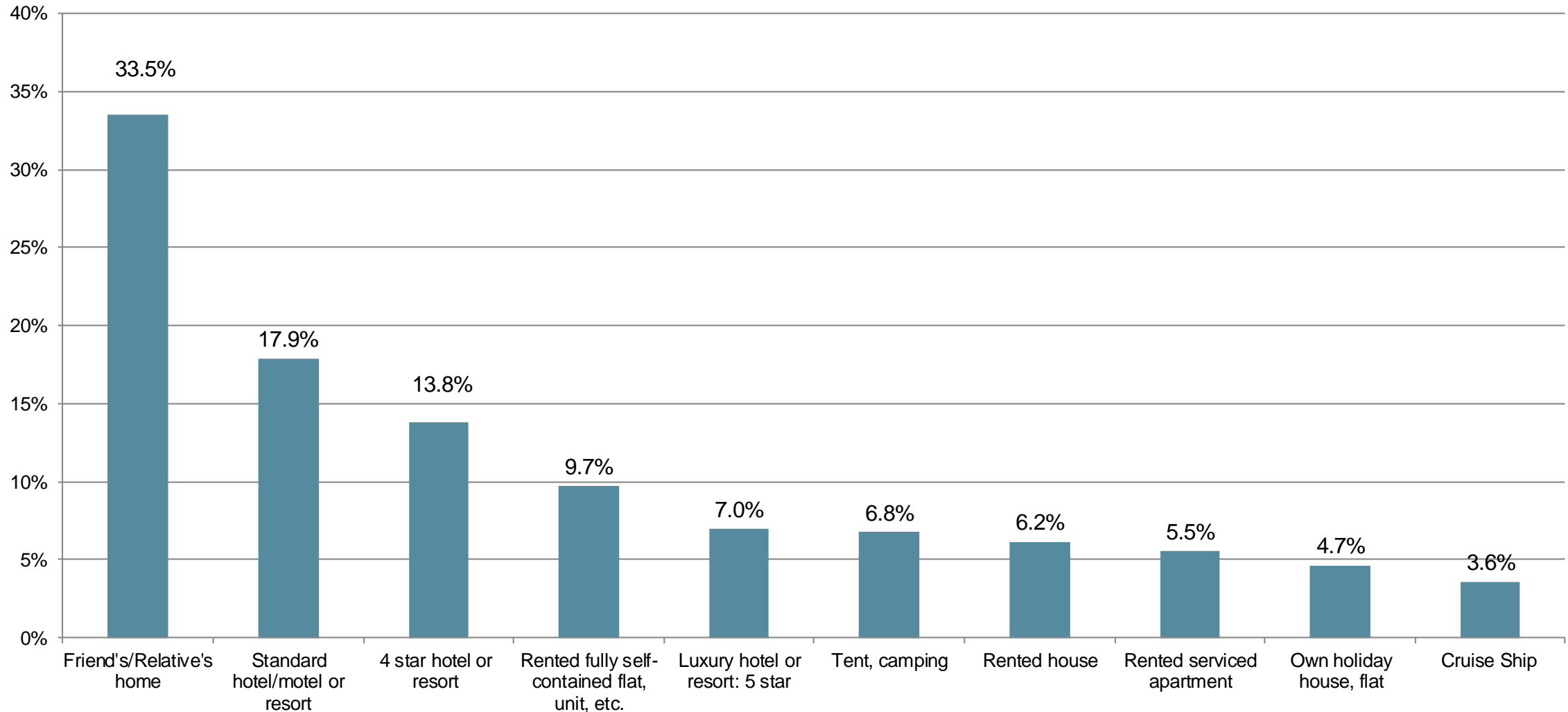
Looking for a moon vacation? Billions being invested in burgeoning space tourism industry

R.A. Schuetz | May 8, 2019 | Updated: May 18, 2019 9:55 p.m.



Australian Travel

Top 10 Accommodation Types used



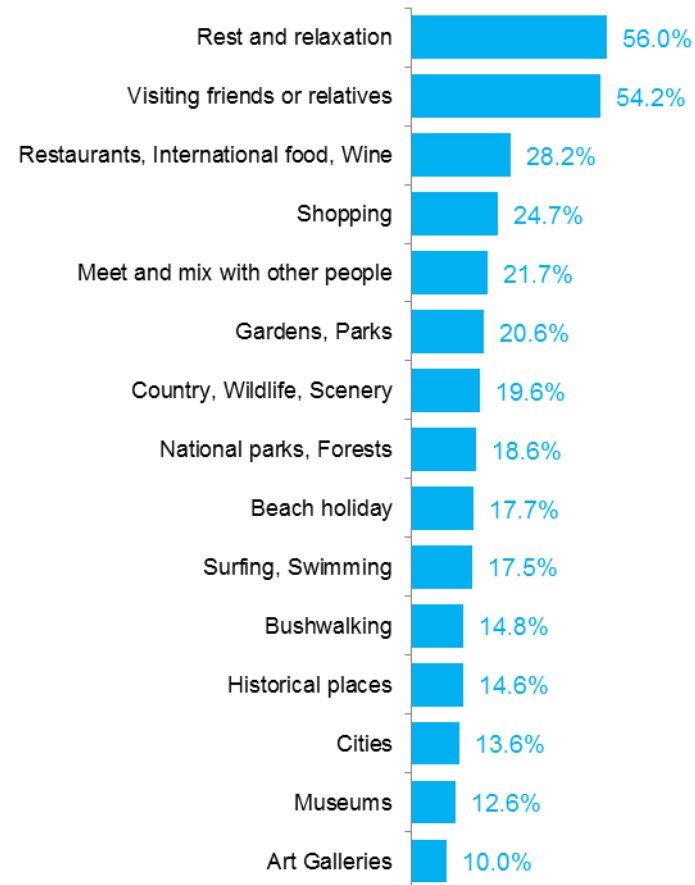
Source: Roy Morgan Single Source (Australia) April 2018 – March 2019

Base: Australian population aged 14+ who took a trip of one or more nights in the last 12 months.

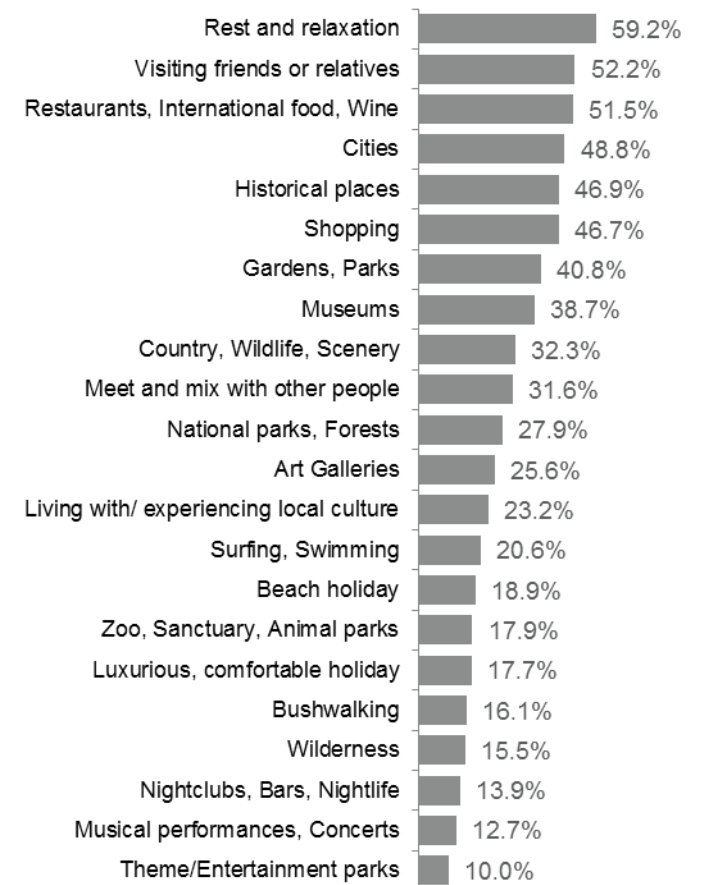
Relaxation and visiting family/friends is still the top activity for both domestic and international travellers, followed by food/eating

- Overseas travellers indulge in a lot more activities compared to domestic travellers
- Food, shopping and nature make up a significant % of activities done by Domestic travellers.

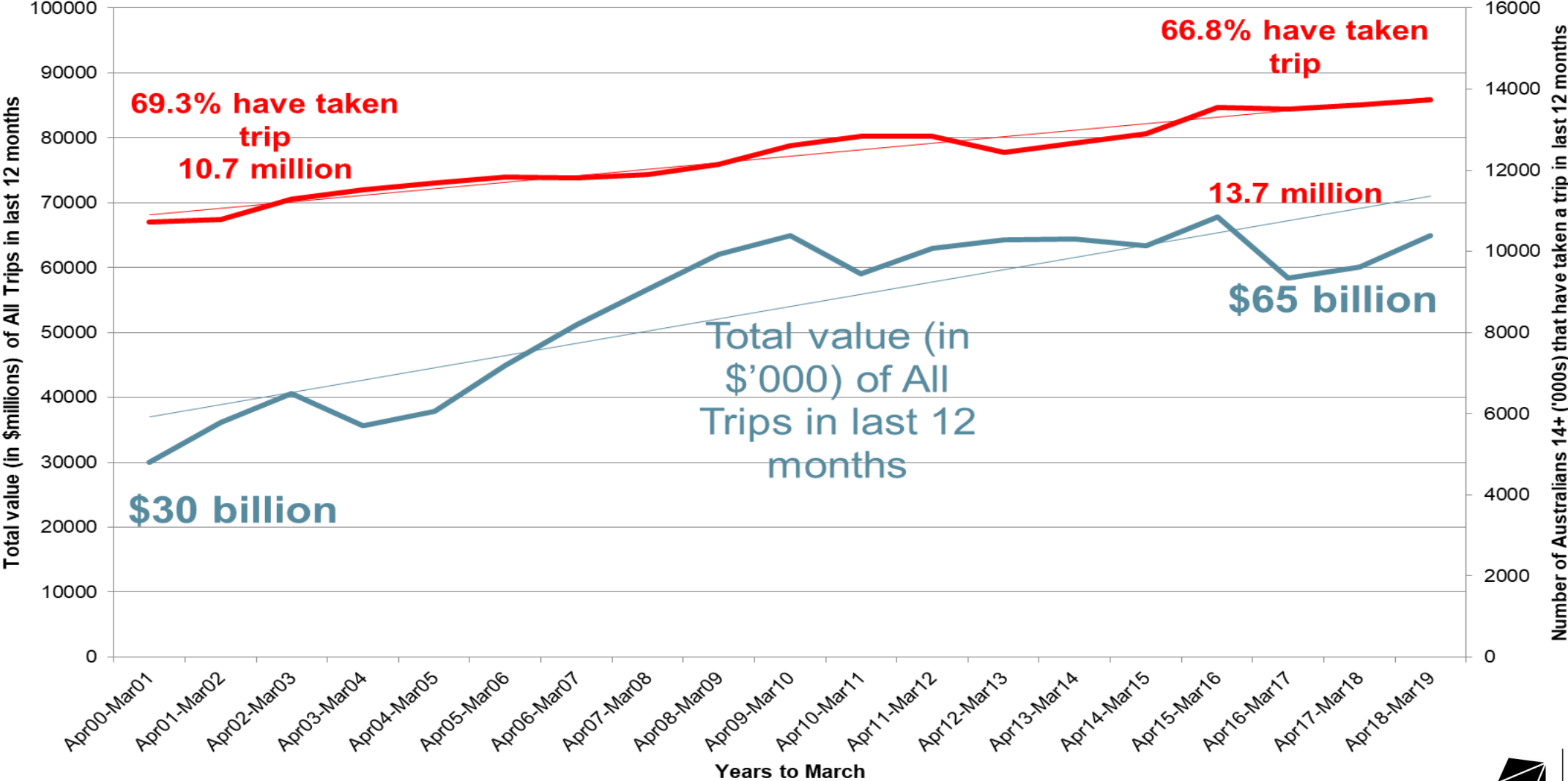
Activities Done - Domestic Travellers



Activities Done - Overseas Travellers



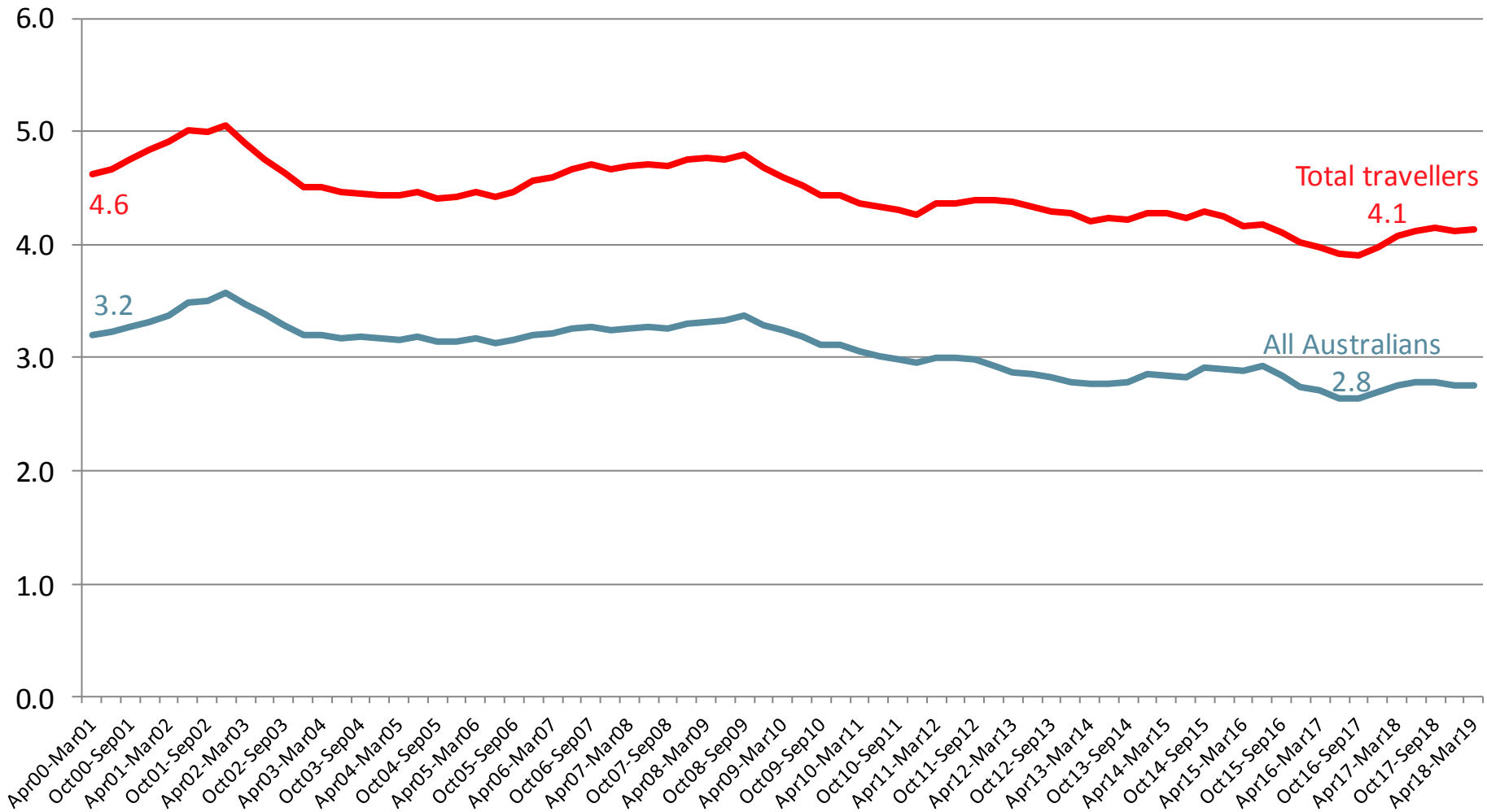
Population growth drives travel numbers



47 Source: Roy Morgan Single Source (Australia) April 2000 – March 2019
 Base: Australian population aged 14+



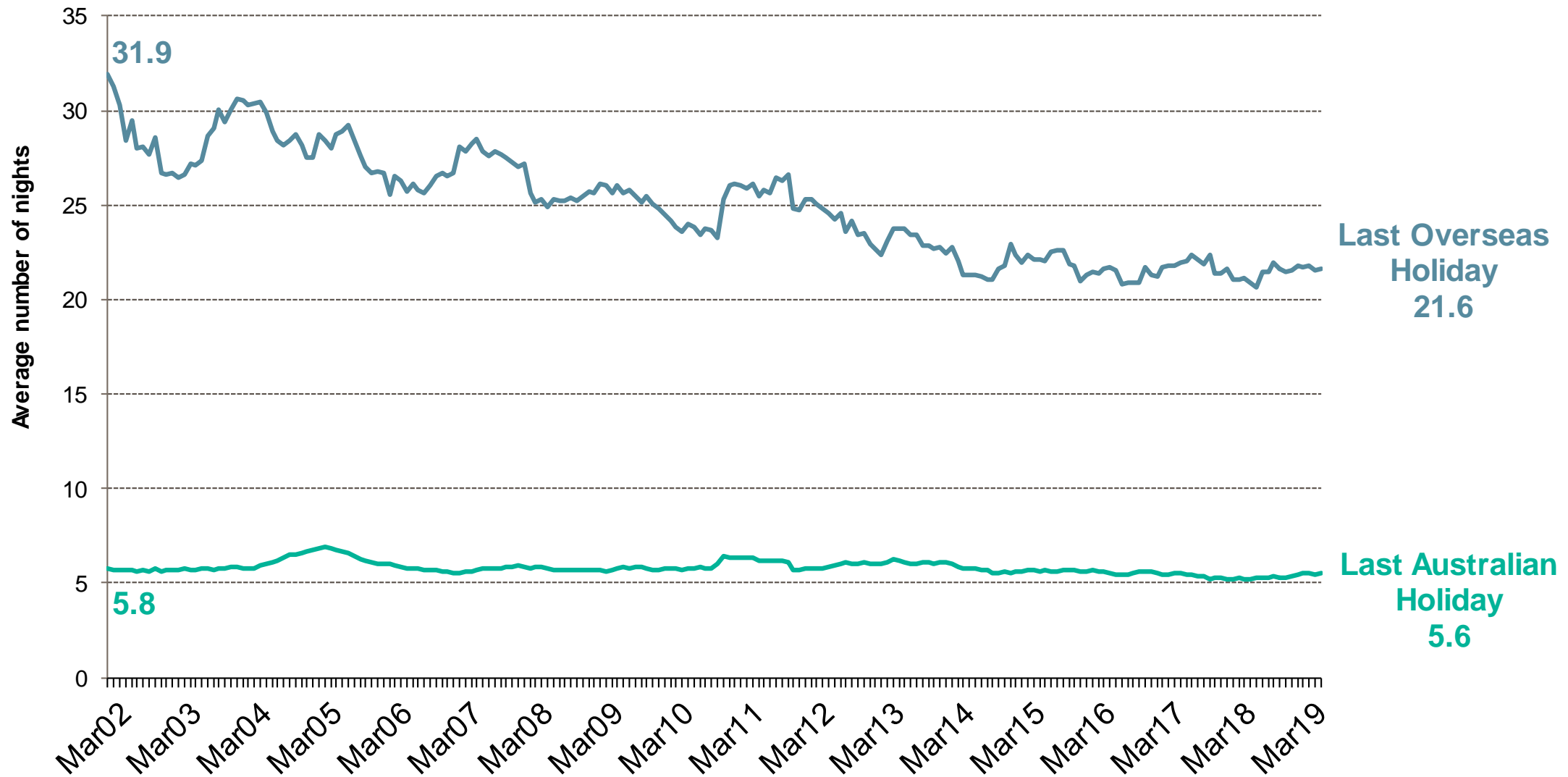
Australians are taking fewer trips



Base: Australian population aged 14+

Source: Roy Morgan Single Source (Australia) April 2000 – March 2019

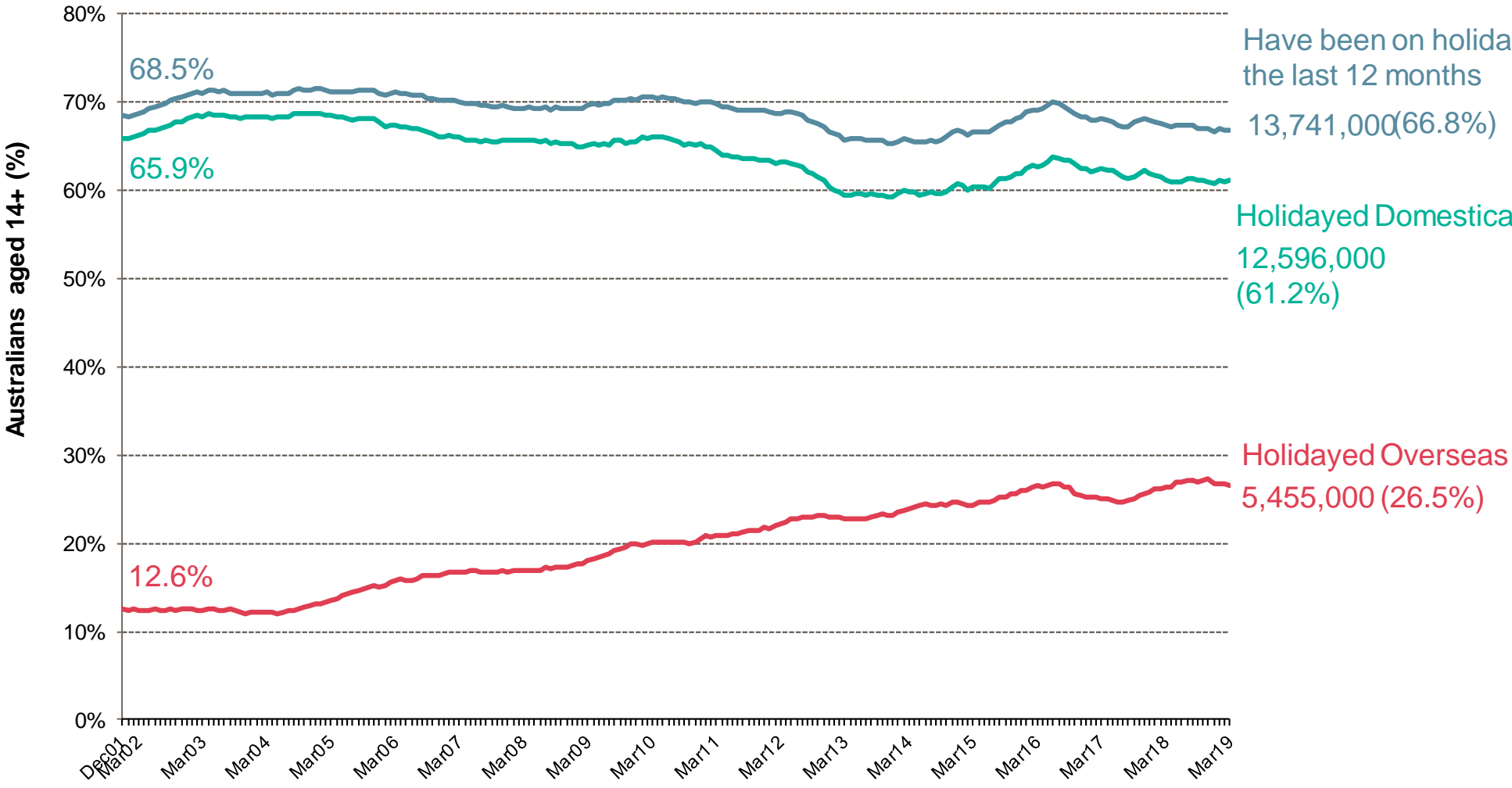
Australians are staying away for shorter periods



Base: Australian population aged 14+

Source: Roy Morgan Single Source (Australia) January 2001 – March 2019, 12 month moving average, sample n = 13,154

Holidays Taken – Trends



Top 5 Domestic

1. Melbourne
2. Sydney
3. Brisbane
4. North Coast NSW
5. Canberra

Top 5 Overseas

1. New Zealand
2. England
3. United States
4. Bali
5. France

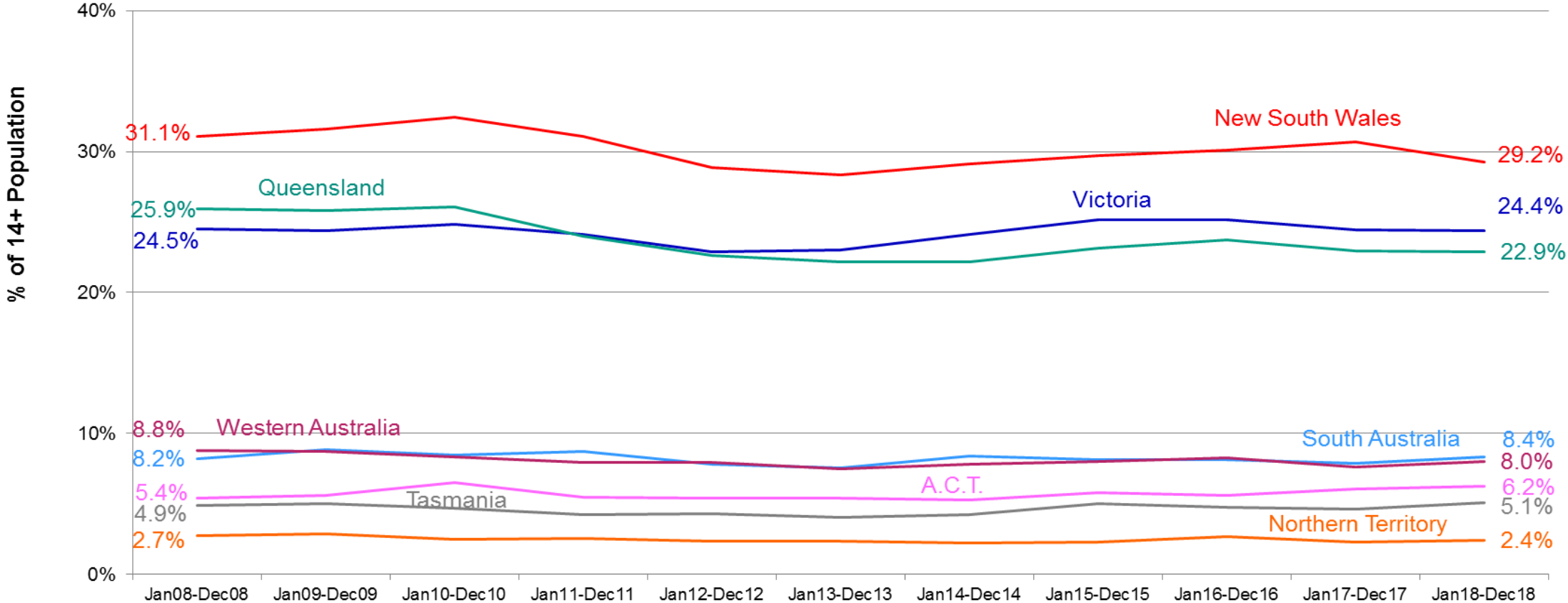
Base: Australian population aged 14+
 Source: Roy Morgan Single Source (Australia) January 2001 – March 2019, 12 month moving average, sample n = 14,722



Looking at domestic **visitation** over the last decade, NSW continues to lead, recovering recently from a drop in 2011-2013.

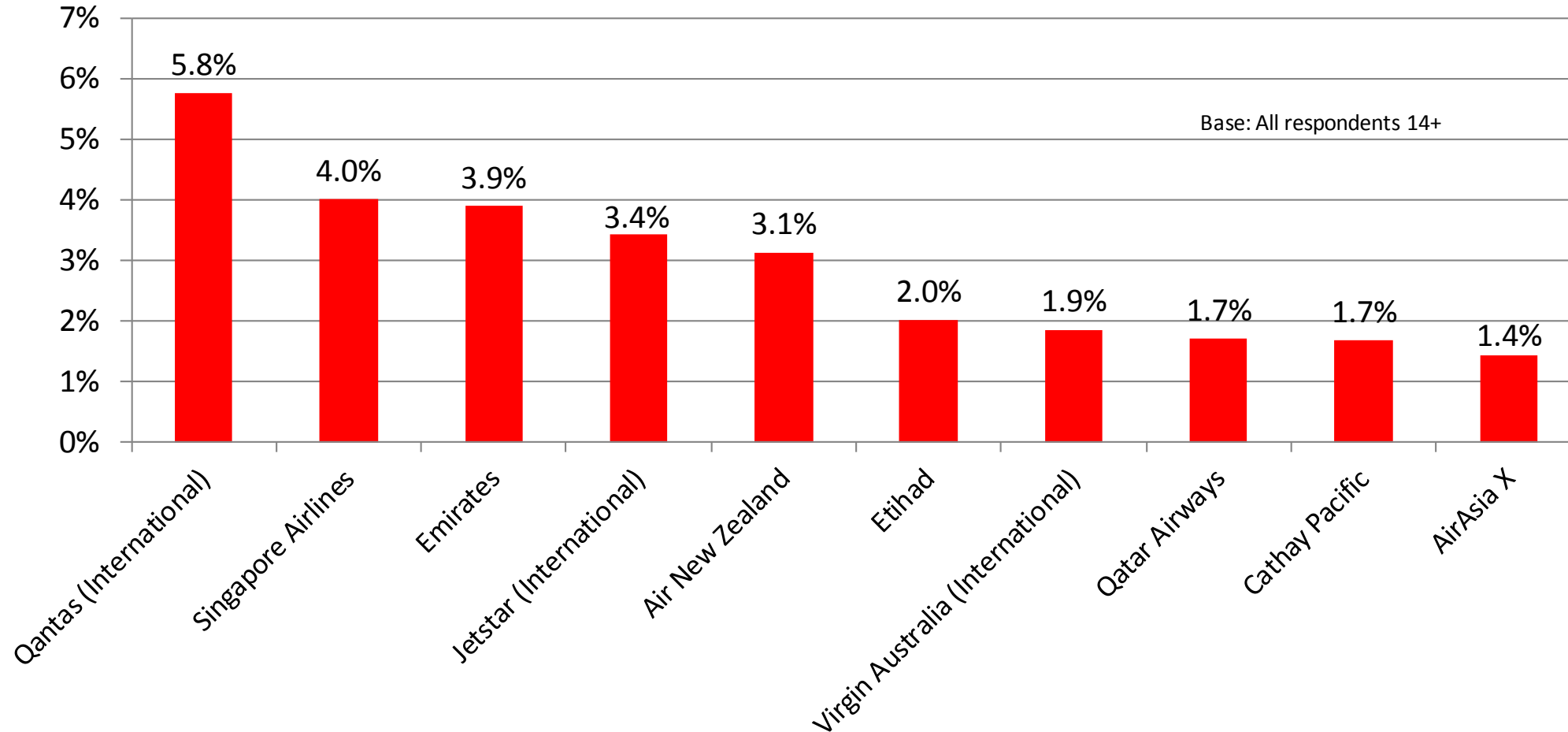
Queensland moves down the ladder, with Victoria moving to 2nd position.

Nett Visitation by States

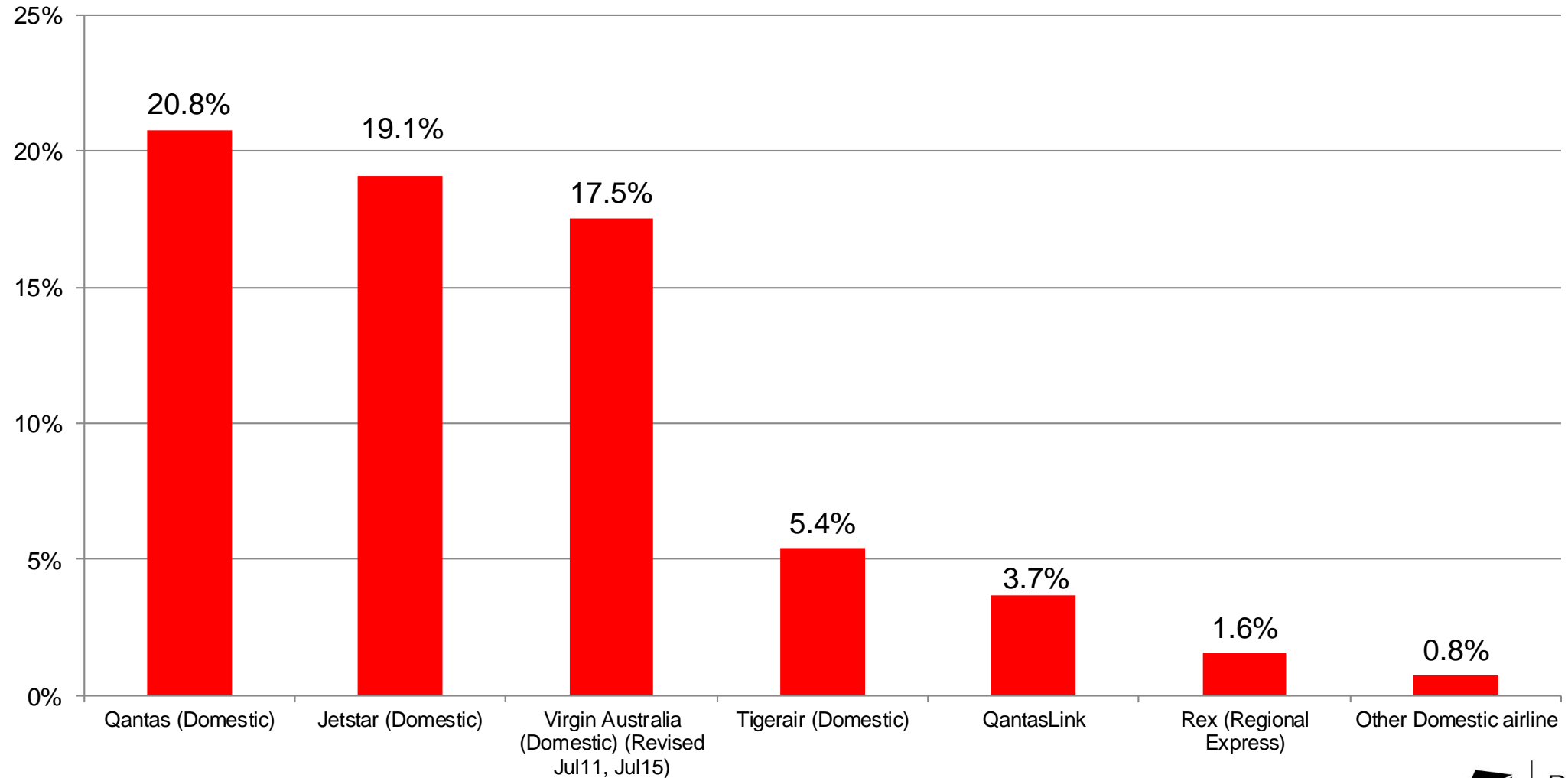


Air Travel

Air Travel – International Airlines used in the last 12 months



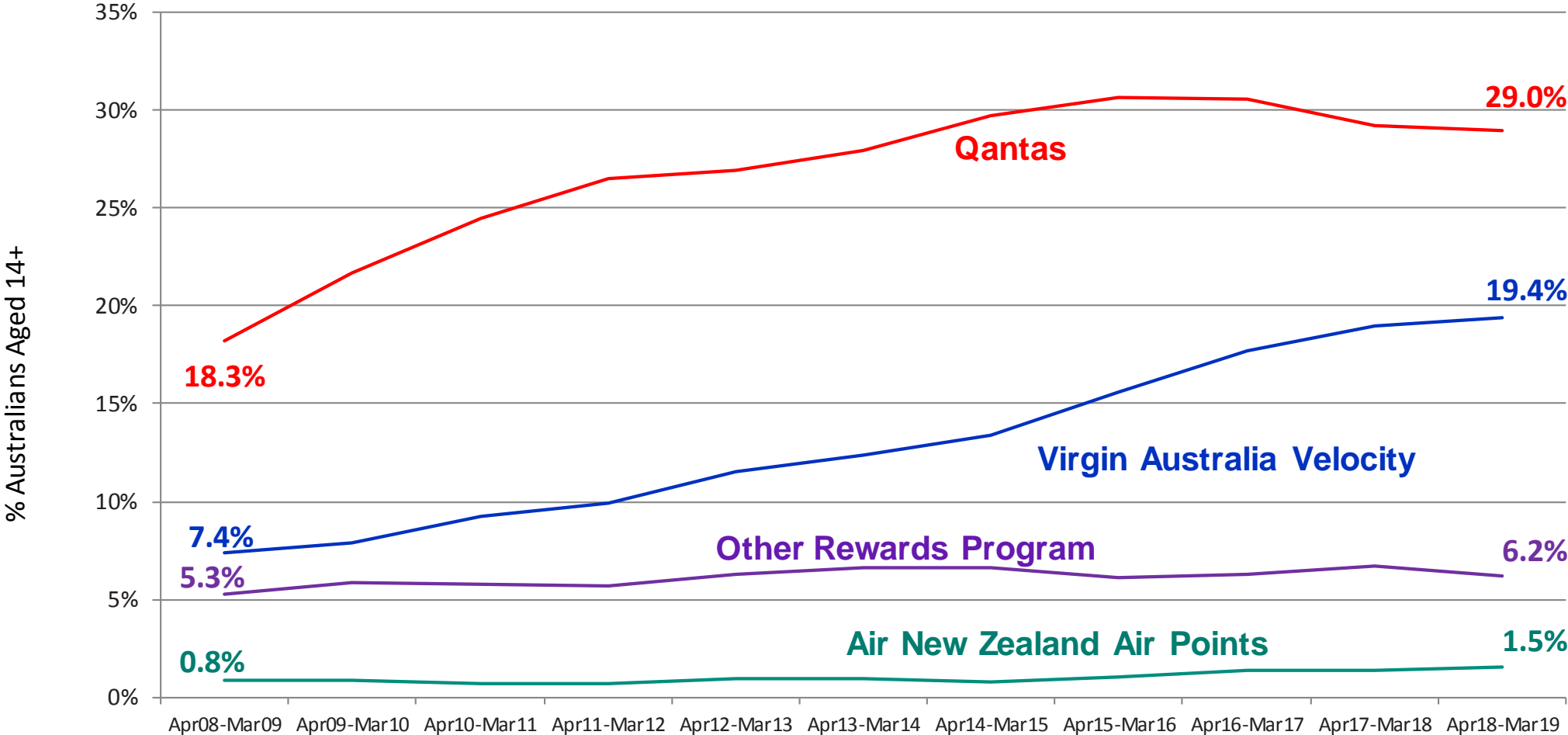
Air Travel - Domestic Airlines travelled in last 12 months



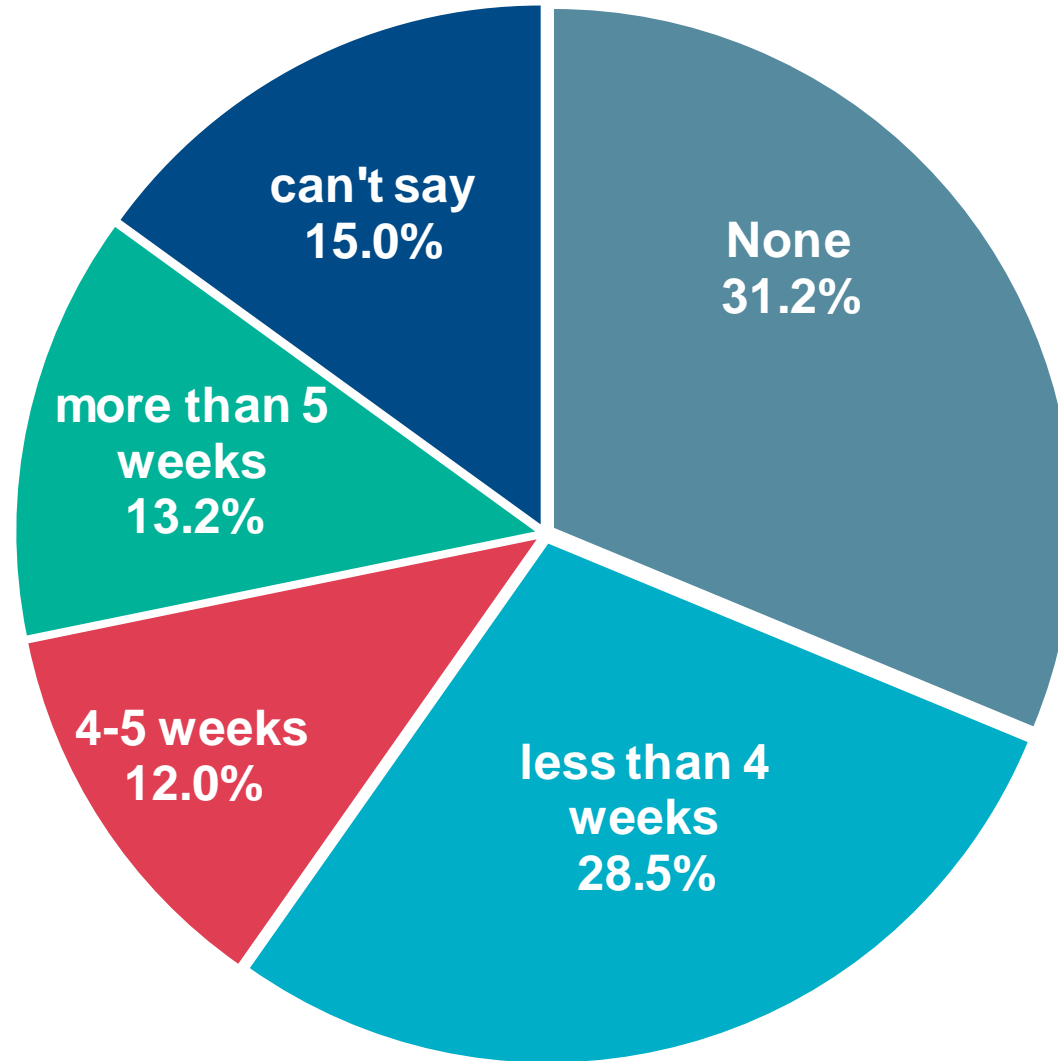
Base: Australian population aged 14+

Source: Roy Morgan Single Source (Australia) April 2018 – March 2019

Frequent Flyer Memberships



140 million days of leave accrued!

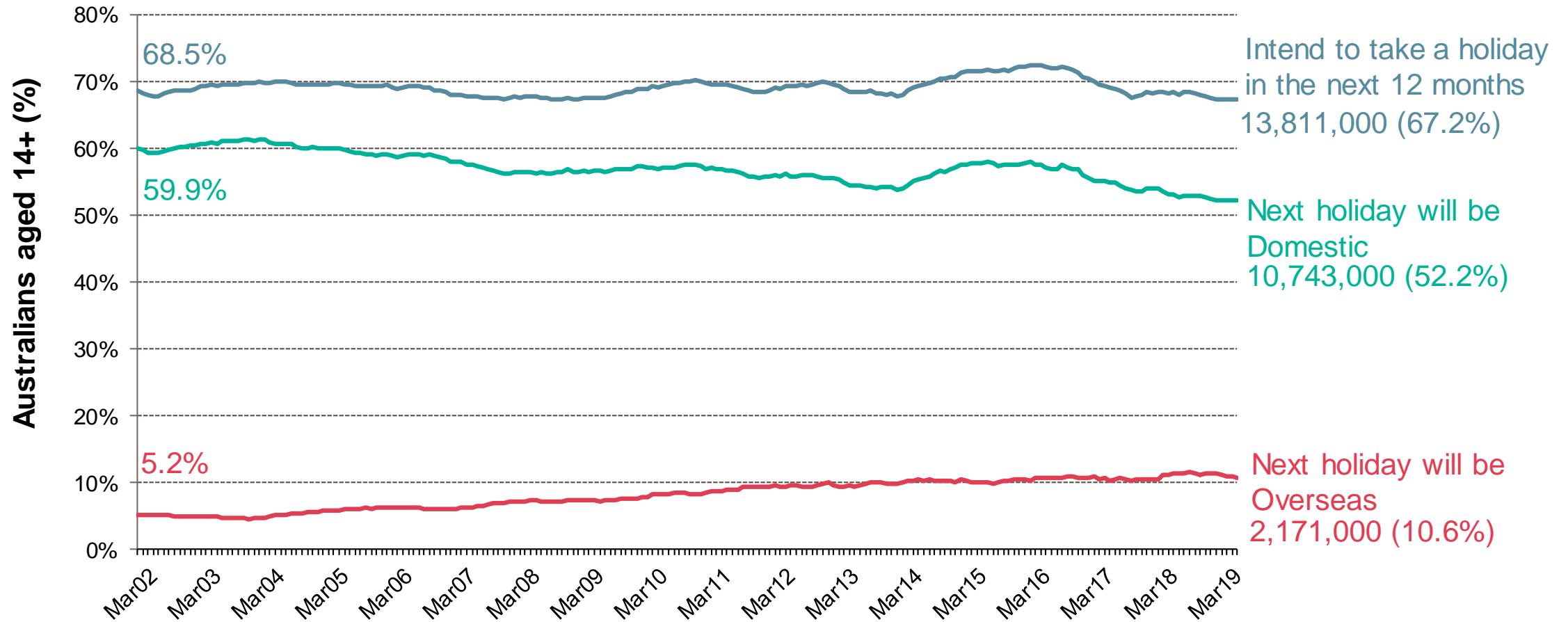


Base: Australian population aged 14+, Paid Workers

Source: Roy Morgan Single Source (Australia) April 2018 – March 2019

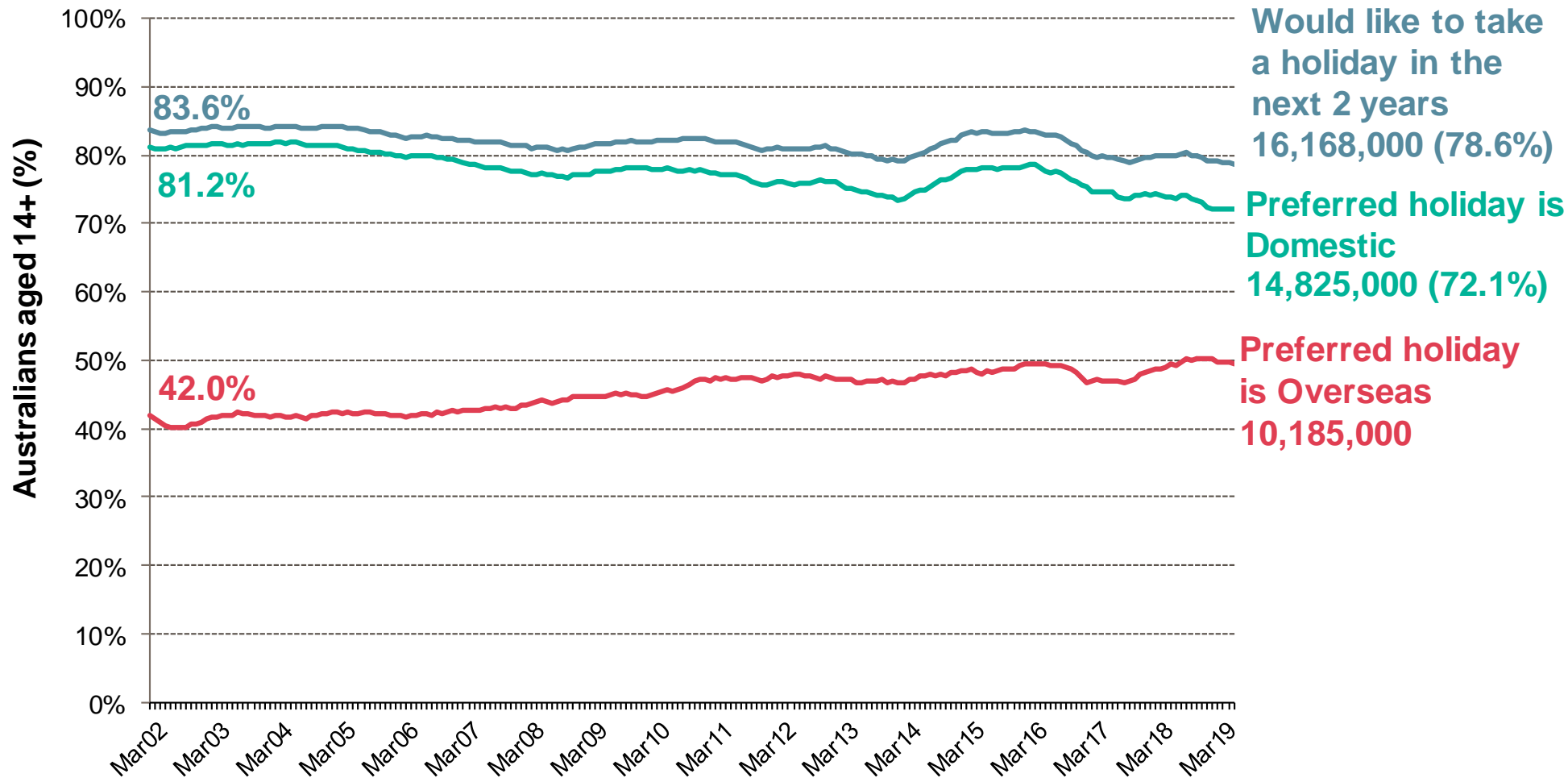
Where will we go?

Holiday intention slowing – but Overseas intention is increasing



Base: Australians aged 14+

Where Australians would like to go



Top 5 Domestic

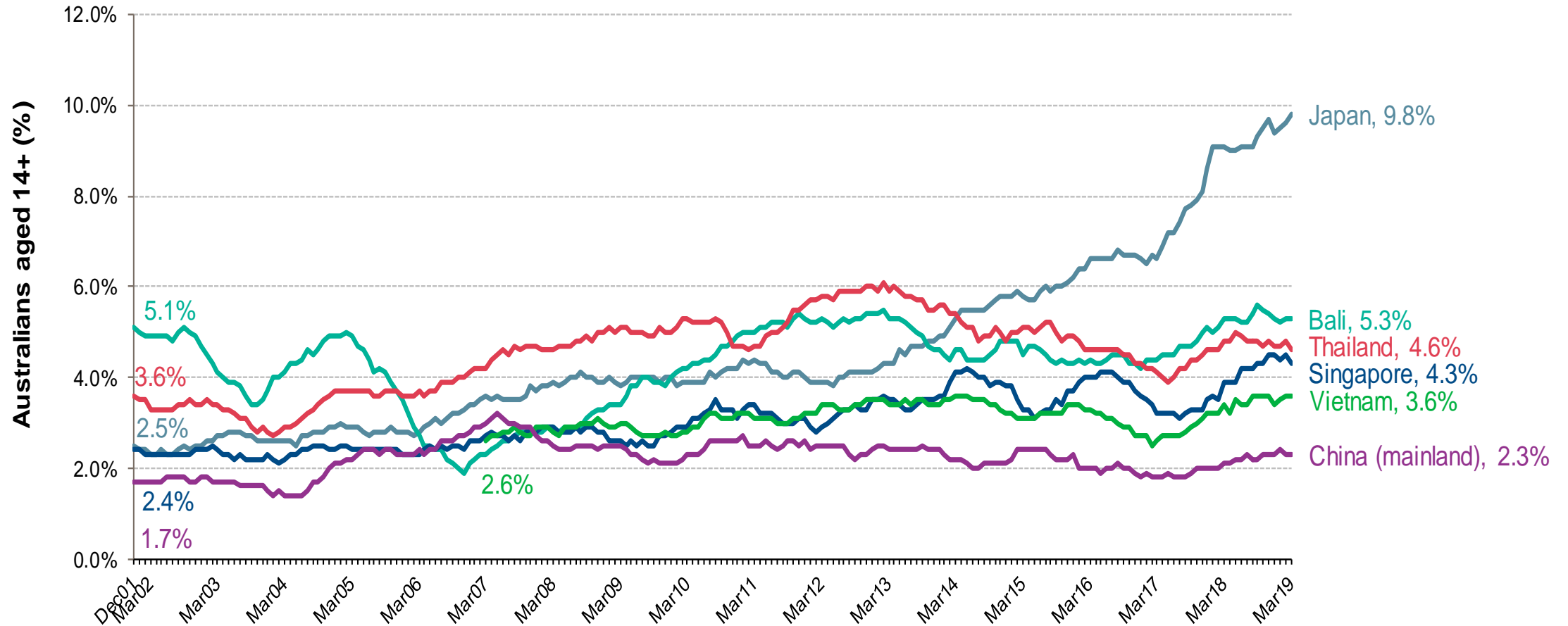
1. Melbourne
2. Sydney
3. Great Ocean Road
4. Hobart
5. Blue Mountains

Top 5 Overseas

1. New Zealand
2. United States
3. England
4. Japan
5. Canada

Base: Australians aged 14+

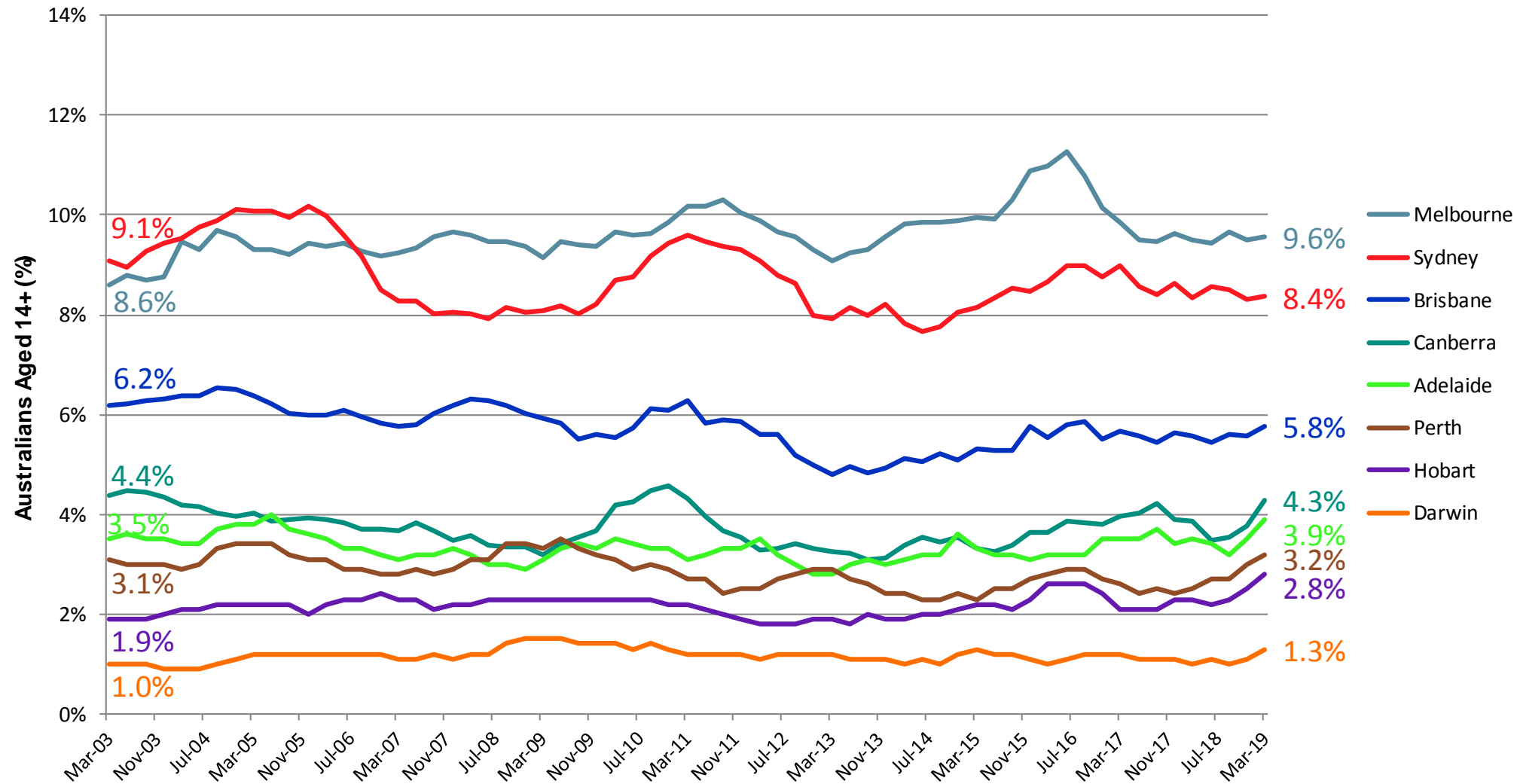
Japan has increased in popularity – Asian Destinations Australians would like to visit



Base: Australians aged 14+

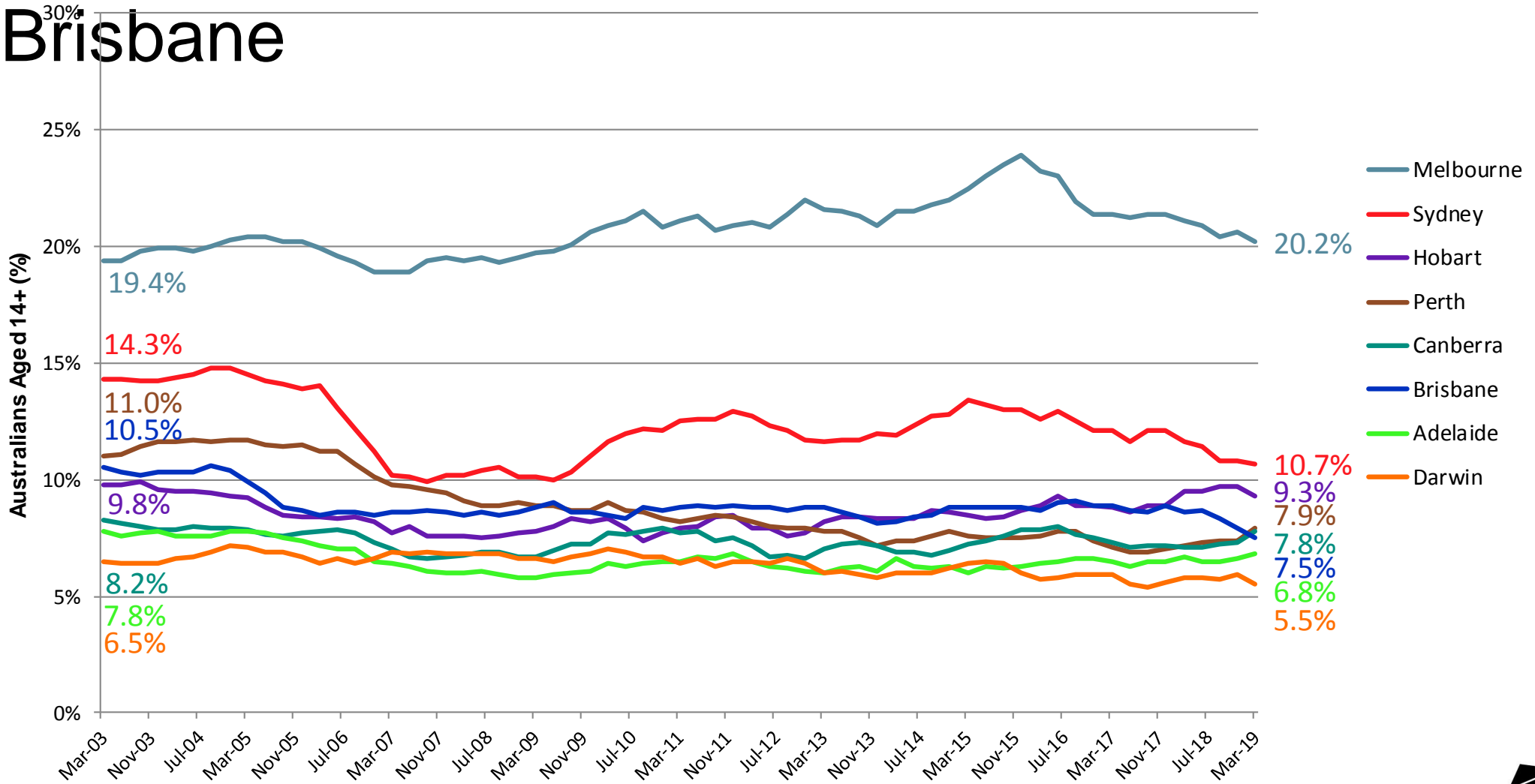
Preference to travel to Canberra

Recently more Australians are visiting Canberra



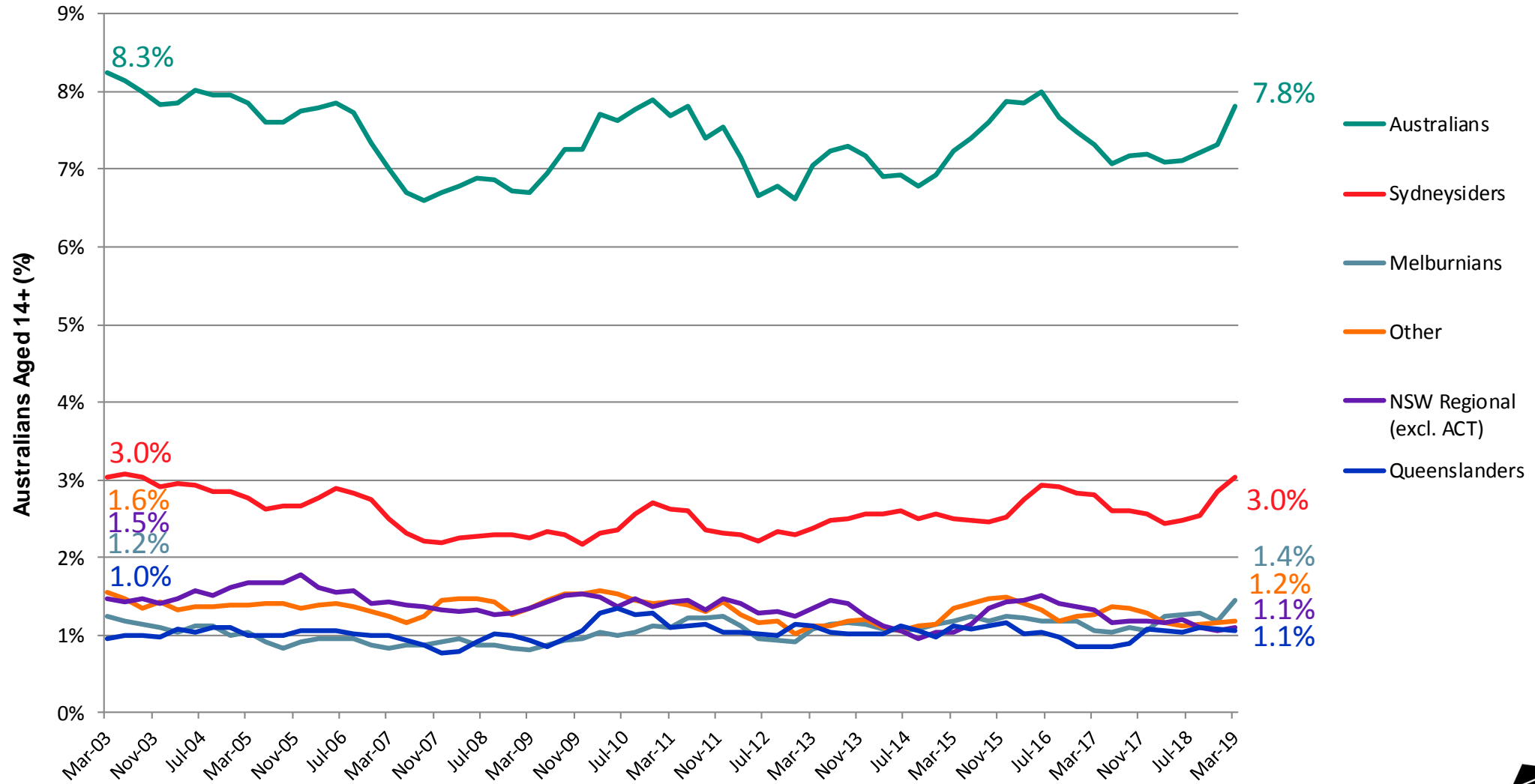
Source: Roy Morgan Single Source (Australia) 12MMA April 2002 to March 2019; Thinking about all holidays that you've taken in the last 12 months. Which places have you stayed at for at least one night?
 Base: Australian population 14+

In the next two years Australians want to visit Melbourne and Sydney; Canberra is higher than Brisbane



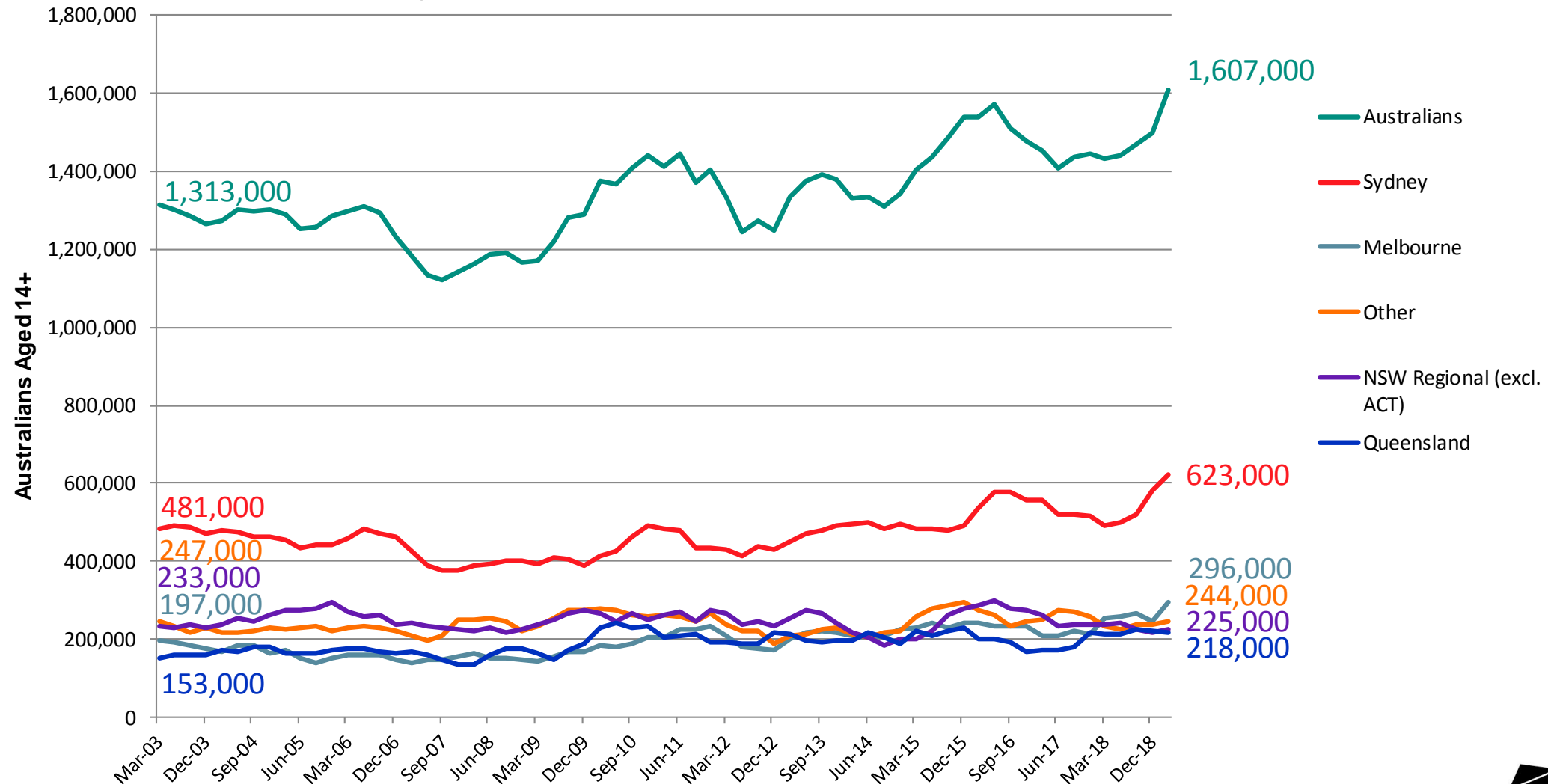
Source: Roy Morgan Single Source (Australia) 12MMA April 2002 to March 2019; In the next 2 years, w hich place w ould you like to spend a holiday?
 Base: Australian population 14+

Sydneysiders are most likely to want to visit Canberra in next 2 years followed by Melburnians



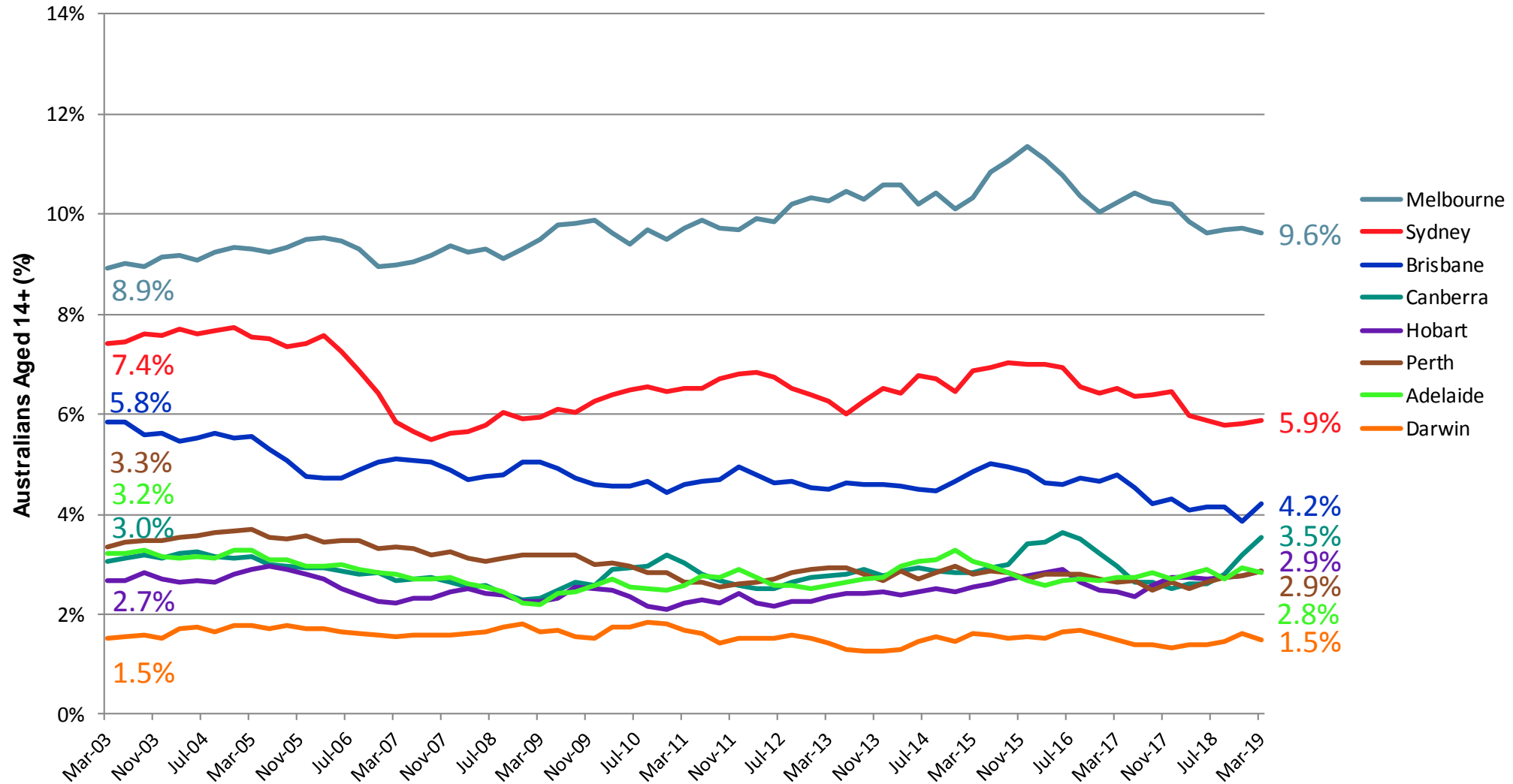
Source: Roy Morgan Single Source (Australia) 12MMA April 2002 to March 2019; "In the next 2 years, which places would you like to spend a holiday (nett trip)?"
 64 Base: Australian population 14+

Australians with a Preference to Travel to Canberra in the next 2 years



Source: Roy Morgan Single Source (Australia) 12MMA April 2002 to March 2019; "In the next 2 years, which places would you like to spend a holiday (nett trip)?"
 Base: Australian population 14+

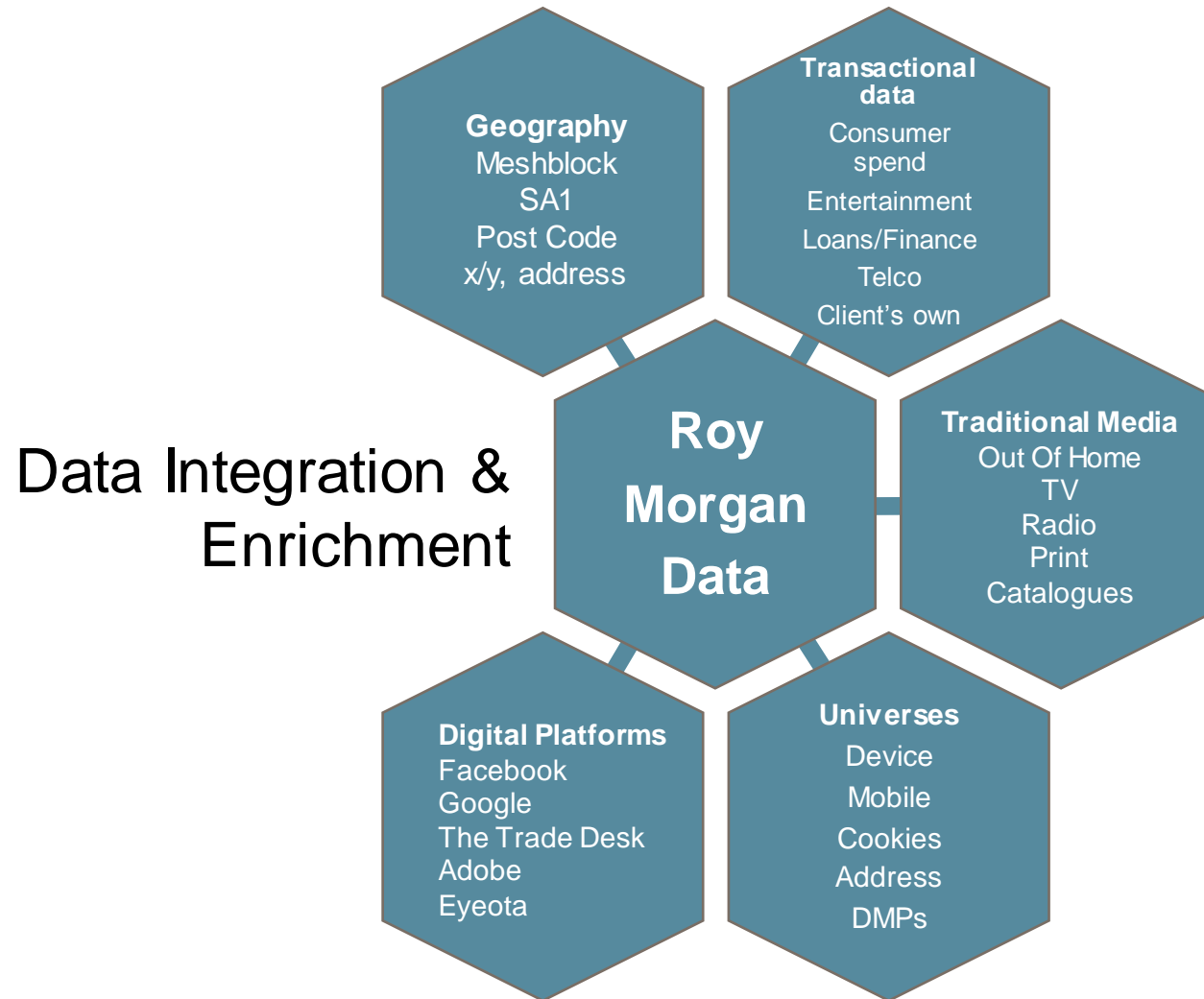
For the next trip, Canberra is becoming more popular



Source: Roy Morgan Single Source (Australia) 12MMA April 2002 to March 2019; "Thinking about your next trip, where will you stay?"
 66 Base: Australian population 14+

What happens next?

ROY MORGAN PLATFORM



Catchments

Meshblock

Radius: 3km

Catchment preferences

Stay within boundary

Catchment locations

Catchment 2 3km

Deselect all

Map tools

Move

Drop pin

Select Meshblock

Meshblock

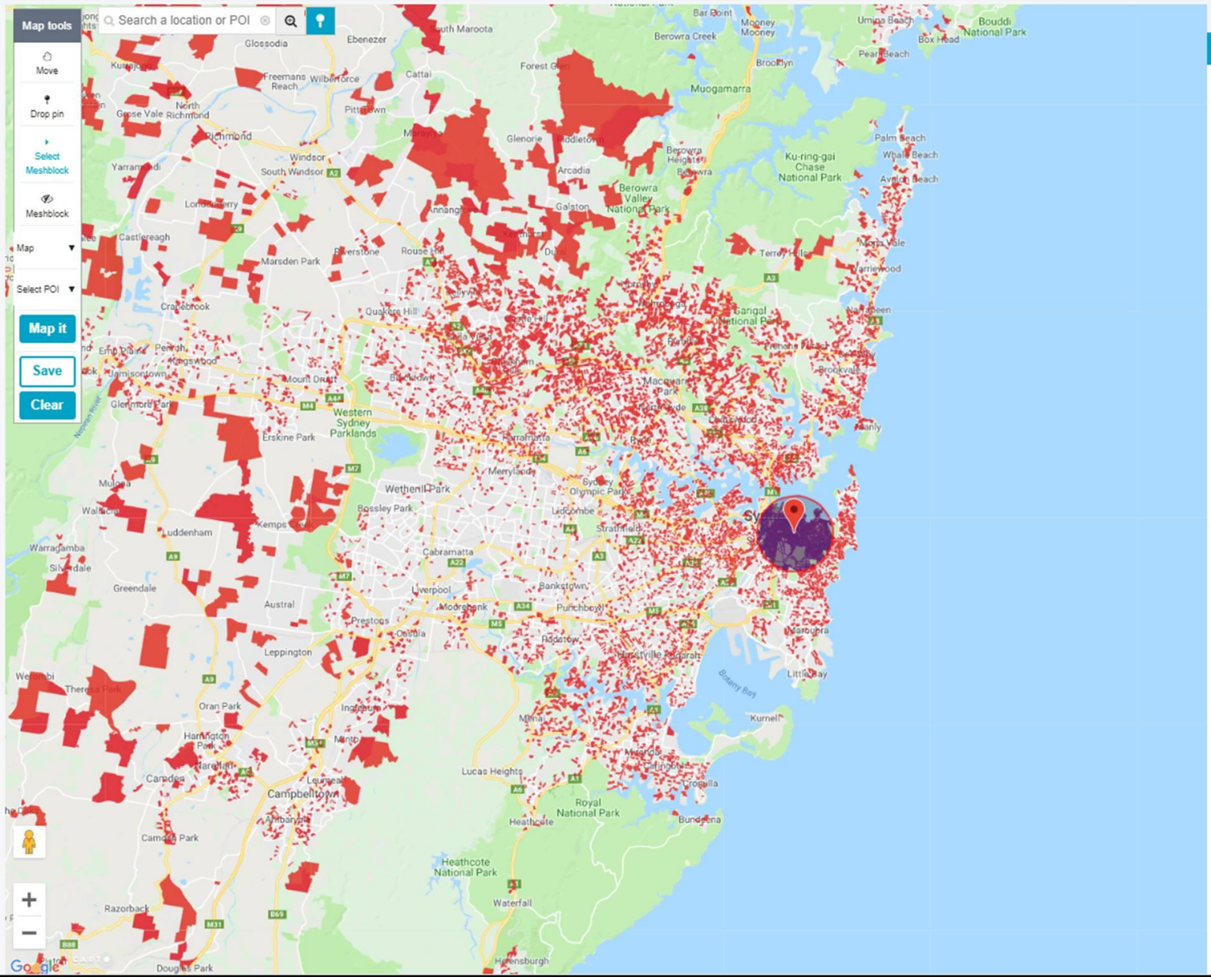
Map

Select POI

Map it

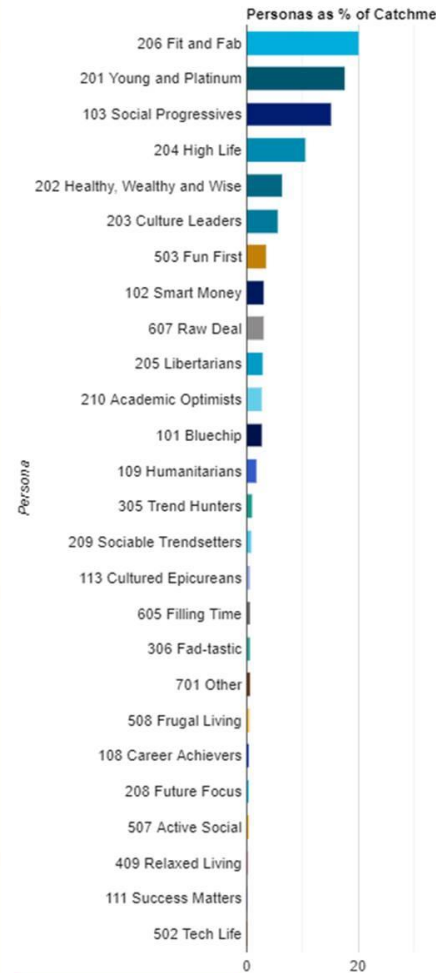
Save

Clear



Selected Catchment Details

Live Population



Total Population	163,972
Total Population 14+	156,001
Average Age	38
Average Personal Income	\$71,224
Average Household Income	\$133,786

Note: Aged 14+

Catchments

Meshblock: ▼

Pin an address:

Radius: 3km ▼

Catchment preferences

Stay within boundary ▼

Catchment locations

Catchment 2 3km 🔍 📍

Deselect all

Map tools

🔄 Move

📌 Drop pin

➔ Select Meshblock

📍 Meshblock

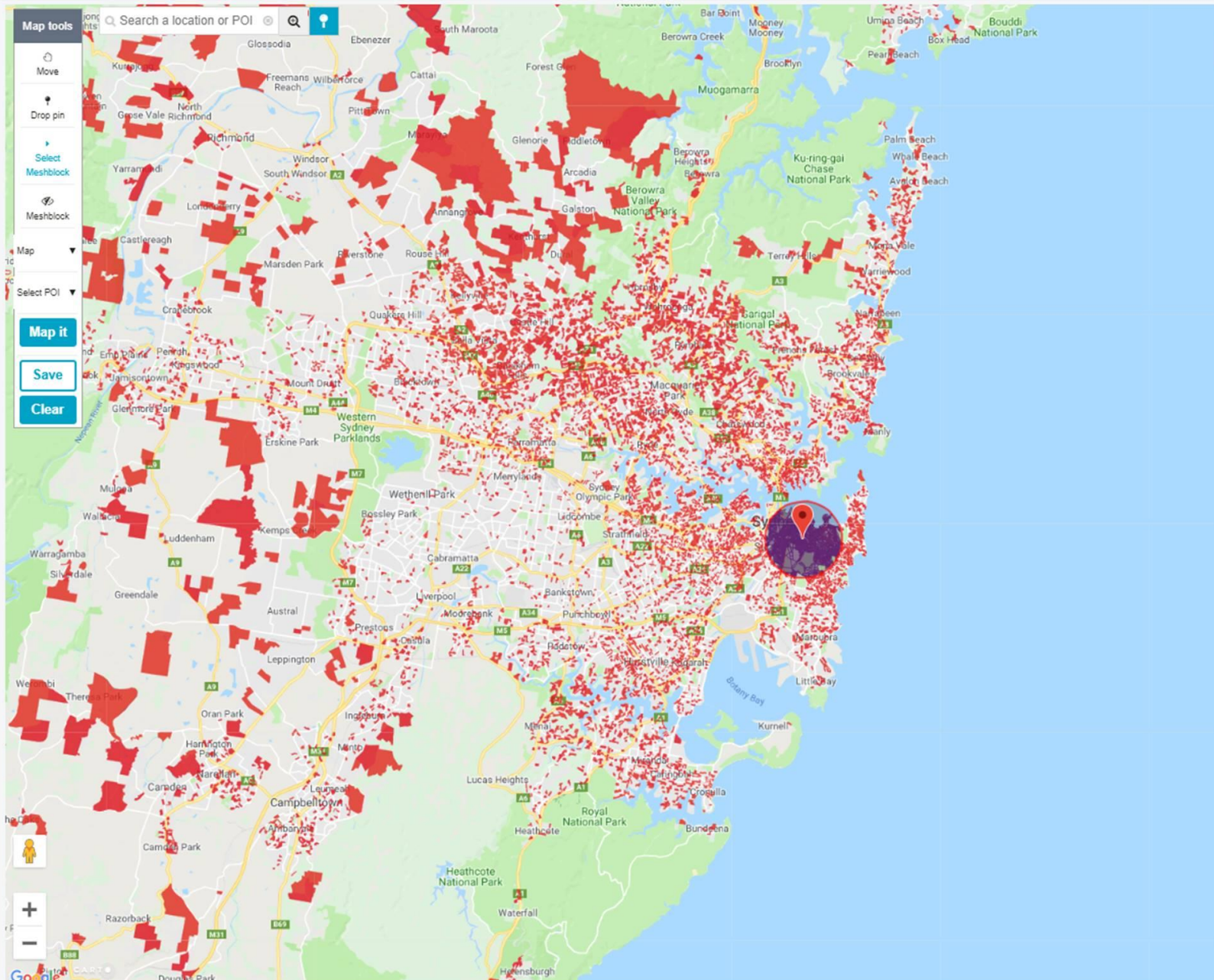
Map ▼

Select POI ▼

Map it

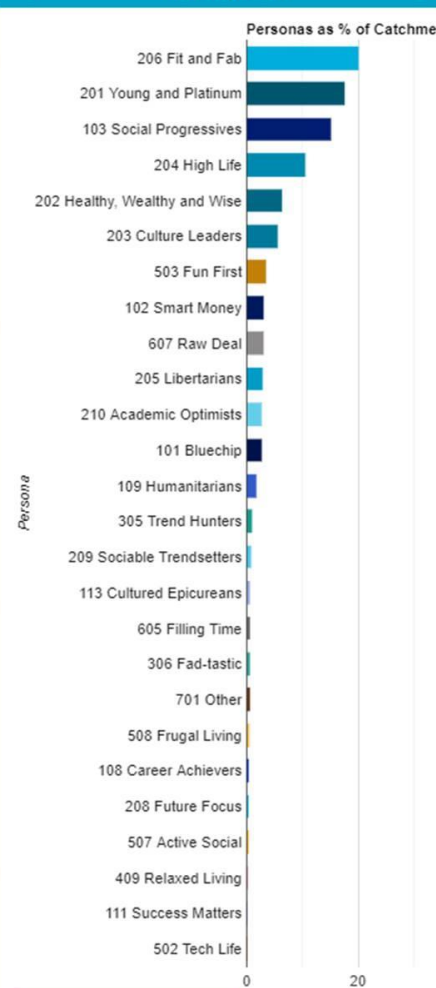
Save

Clear



Selected Catchment Details

Live Population



Total Population	163,972
Total Population 14+	156,001
Average Age	38
Average Personal Income	\$71,224
Average Household Income	\$133,786

Note: Aged 14+



Changing Landscape



1. Virtual reality lets travellers try before booking
2. Find-engines are replacing search engines
3. Curators are replacing non-PLU ranters
4. Digital curators will kill travel storefronts
5. Micro-treasures are the new destinations
6. Live video streams of experiences – BIG
7. Hyper-local dining is the next BIG treasure
8. More use smartphone than desktop for travel
9. Tracking where travellers have been
10. Using Deep Data to personalise experiences

Questions



More information

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