

Domesticate 2018

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



We gotta get out of this place...

Media-Driven Climate of Fear

Australians in 2018 are more worried than ever – of global conflict, random crime in cities, on top of the stress of working long hours to pay the bills and mortgage. Social Media also plays a role in applying pressure to keep up appearances and maintain high living standards.

Holidays are not a luxury, but a necessity

City-dwellers use the term 'escape' when talking about holidays. Short breaks alleviate stress levels and far more so when they are taken away from city centres.

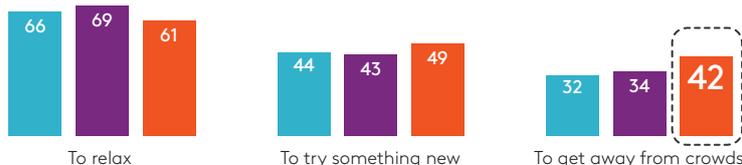
Getting away from crowds is more important than ever before

While the key motivators for domestic holidays include 'to relax' and 'to try something new', 'getting away from crowds' has become more important for both intrastate and interstate travellers in 2018.

Within your home state



Outside your home state

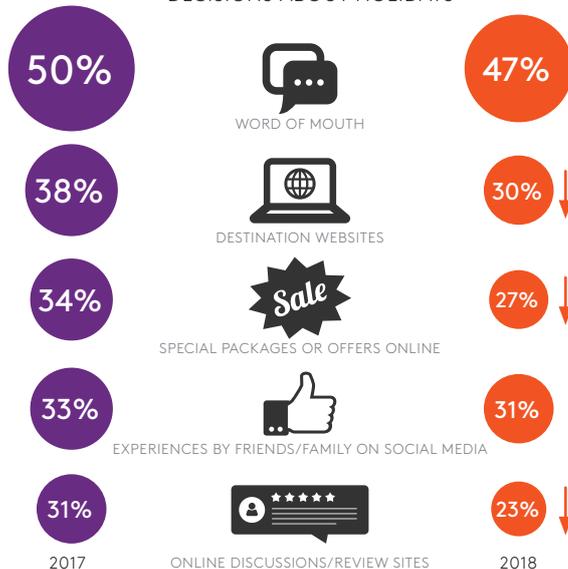


The influence of communication channels has fallen

Lower impact across most channels

People's reliance on destination websites, online packages and online discussion/review sites for travel information and inspiration has dropped in the past year. The only channel staying steady is word of mouth – in person or via social media.

INFLUENCE OF TOP 5 COMMUNICATION CHANNELS ON DECISIONS ABOUT HOLIDAYS



Mistrust is everywhere

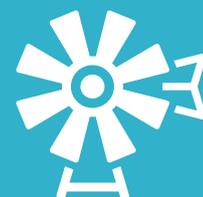
54% of Australians think most of the information on social media is unreliable – compared to 27% on average across the APAC region.

Similarly, 49% of Australians think that brand content on social media is not relevant to them – compared to 26% across APAC.

Escape to the country

Regional destinations are key draw-cards for what Australians are seeking from their holidays, but some improvements can be made in how the offer is presented and communicated to prospective visitors:

- Improving knowledge of Australia's heritage and indigenous experience is vital to drive interest
- While regional destinations shouldn't try to compete with metropolitan nightlife, offering authentic night-time experiences that showcase the destination beyond daylight hours is essential
- There is no such thing as a 'typical' regional holiday; visitors are driven mainly by what they can do there



The three guiding principles for creating a regional destination brand

1
 Stop talking about 'regional' travel – People don't think about regional destinations as brands.

2
 Be wary of language – regional travel is about experiences, not destinations.

3
 A destination's brand is the combination of experiences on offer.

Regional Experiences What needs do they fulfil?

When it comes to regional travel, people don't have one typical destination or area in mind, but these experiences are common to everybody's idea of the opportunities for regional Australia:



METRO/ CITY

Indulgent - Energetic - Refreshing

Compared with regional destinations, city holidays provide a change of scenery to indulge and experience activities people don't do at home.

 ADVENTURE	Sense of Accomplishment Rejuvenation of mind and soul	 FARM	Personal development Connection with the land Escaping city life	 NATIONAL PARK	Rejuvenate the soul Refreshing Escape
 BEACH/ COASTAL	Reconnection Carefree Soaking in the surrounds	 FOOD/ WINE	Indulgent Healthy body and life Soft adventure	 RIVERS/ LAKES	Relaxed Reconnecting with people Escaping to nature
 BUSH/ OUTBACK	Thoughtful Rustic Change of Pace	 HILLS/ MOUNTAINS	Exploration Cosiness Getting close to nature	 SMALL TOWN	Experiencing a new place Discovering hidden gems Quirky character
 EVENTS/ FESTIVALS	Feeding a passion Learning A draw-card for unusual destinations	 INLAND	Reconnecting Short breaks away Freedom	 SNOW	Indulgent Invigorating Balance of introspection and adventure

 **Australia is a short break destination...** The key to unlocking greater visitation spend is not to push people into longer holidays but enable them to escape more often through quality accommodation deals or packages.

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