Market and Trade Profile: Australia

Australia

Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Australian travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Australian visitors in the UK.

- **Chapter 2: Understanding the market** takes a close look at Australian consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by the Indians are also highlighted.

- **Chapter 3: Access and travel trade** shows how the Australian travel to the UK, how to best cater for their needs and wants during their stay and gives insights into the Australian travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.

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Inbound market statistics

Chapter 1: Inbound market statistics

Chapter summary

- The Australian outbound market is forecast to account for over 19.5 million trips abroad with at least one overnight stay by 2020. The UK was the 4th most popular destination for such trips in 2016 overall, and the 1st most popular in Europe. Australia ranked 6th globally for international tourism expenditure in 2016, up 2 places on 2015, with US$30.8bn spent in 2016.
- Australia was the 10th largest source market for the UK for volume but 4th for spend in 2016 as average spend per visit from Australia is 80% higher than the all-market average.
- Australians tend to prefer the summer months to visit the UK: 4-in-10 inbound visits in 2016 happened between July and September.
- Australians tend to stay longer per visit on average and travel more around Britain than the global average.

2016: £1.1bn spent in the UK

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO

Chapter 1.1: Key statistics

Key insights

- Australia was Britain's 10th largest source market in terms of visits and 4th most valuable for visitor spending in 2016.
- Visits from Australia to the UK are mainly made to visit friends and relatives or for holidays (44% and 43% of all 2016 visits from Australia to the UK respectively). Australian holidaymakers spend more in Britain than those visiting their friends or relatives (43% and 38% of inbound spend respectively).
- London is the leading destination for a trip to Britain (61% of visits from Australia to Britain included an overnight stay there). However, Australian visitors also tend to travel around the UK more than the average visitor (both in terms of visits including a stop in the different regions and nations, and the total nights they spent there).
- The most popular activities undertaken by Australian visitors in Britain include dining in restaurants, going shopping, going to the pub, and socialising with the locals.

4th

most valuable inbound market for the UK (2016)

Source: International Passenger Survey by ONS, Oxford Economics

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2016
International tourism expenditure (US$bn)	30.8
Global rank for international tourism expenditure	6
Number of outbound overnight visits (m)	16.0
Most visited destination overall	New Zealand
Most visited destination in Europe	UK

Inbound travel to Britain overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend			
2007	941	12,154	668
2008	955	13,199	769
2009	912	13,310	856
2010	986	13,929	951
2011	1,093	13,601	1,015
2012	993	13,366	1,018
2013	1,058	14,818	1,183
2014	1,057	15,000	1,224
2015	1,043	14,245	1,113
2016	982	12,912	1,060
Share of UK total in 2016	2.6%	4.7%	4.7%

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	982	-6%	10
Nights (000s)	12,912	-9%	7
Spend (£m)	1,060	-5%	4

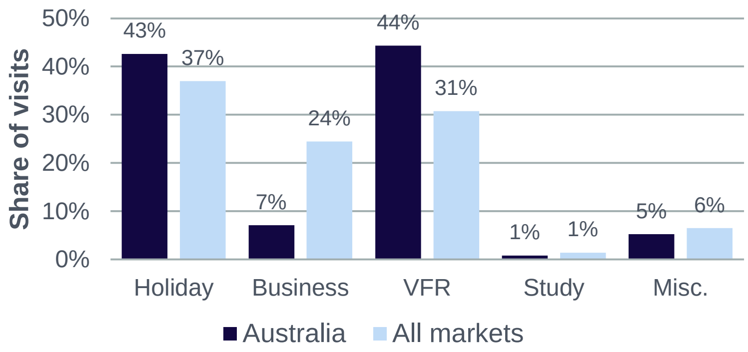
Nights per visit, spend

Averages by journey purpose in 2016	Nights per visit	Spend per night	Spend per visit
Holiday	11	£103	£1,098
Business	9	£222	£2,044
Visiting Friends/ Relatives	16	£56	£915
All visits	13	£82	£1,079

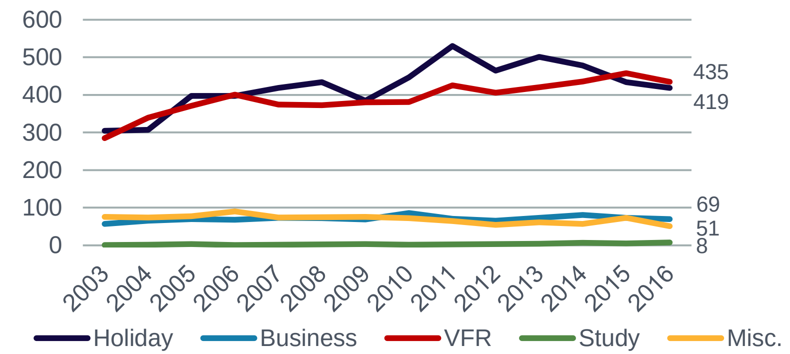
Source: International Passenger Survey by ONS

1.1 Key statistics: journey purpose

Journey purpose 2016



Journey purpose trend (visits 000s)



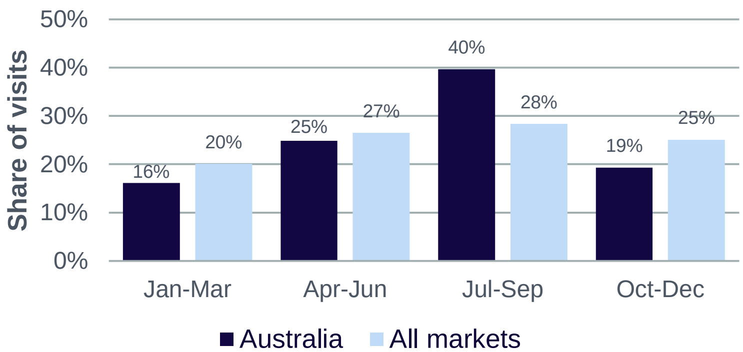
- 44% of all visits to the UK from Australia were made to visit friends and relatives, followed by 43% of visits made for holiday purposes. Fewer visits were made for business (7%), or miscellaneous purposes (5%)
- 62% of holiday visits made by Australian residents to the UK (excl. UK nationals) were made by repeat visitors in 2015, just below the all-market average (63%). The proportion of Australian business visits that were on a repeat visit was on par with the all-market average (92%), and Australians are similarly likely to repeat a visit to friends and relatives than the average UK visitor (87% vs 85%).

- Holiday and VFR both account for over 80% of all visits from Australia to the UK. There were slightly more VFR visits in recent years than holiday visits, but their shares of inbound visits are very close.
- In terms of inbound spending, though, over 40% came from Australian holidaymakers in 2016 (43%), while VFR made up for over a third (38%). Most of the remainder came from business visits (13%).
- Australian visits to friends and relatives tend to be longer than business and holiday visits; VFR visits represent 55% of all nights spent by Australians in the UK in 2016).

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015

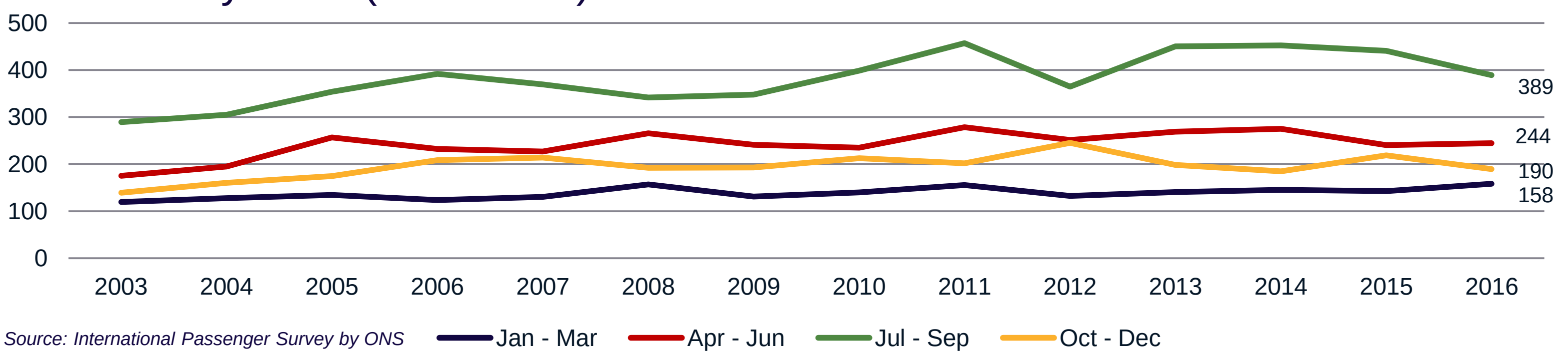
1.1 Key statistics: seasonality

Seasonality 2016



- Australian visitors tend to go to the UK in the summer months: in 2016, 2-in-5 visits from Australia to the UK were made between July and September.
- 1-in-4 visits happened in April-June, followed by October-December (almost 1-in-5).
- Q1 is a slightly less popular time among Australian visitors to the UK, with fewer visits than in any other quarter of the year (just 16% of all visits from Australia to the UK in 2016).

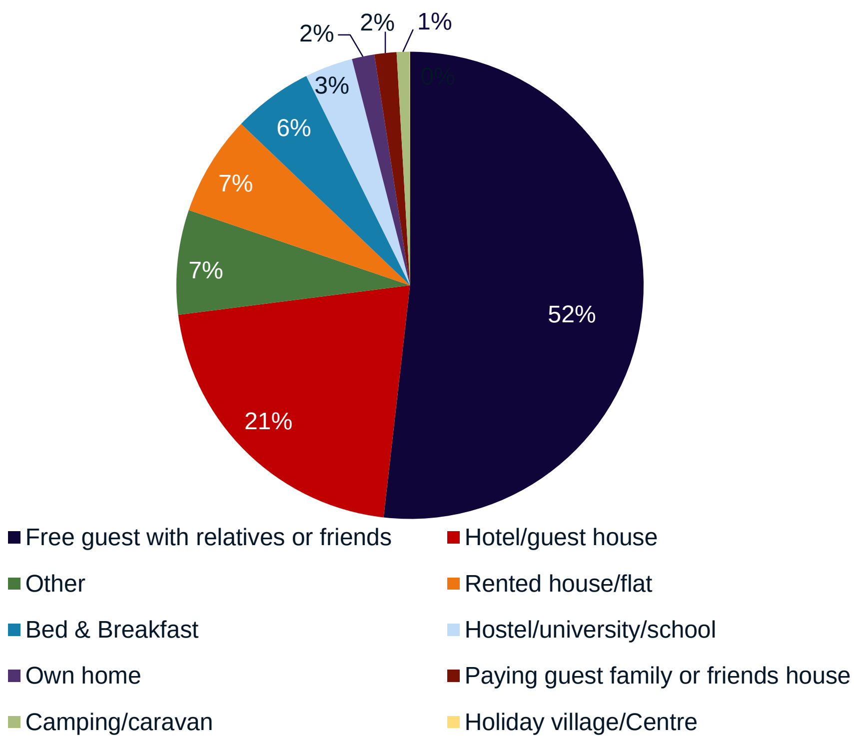
Seasonality trend (visits 000s)



Source: International Passenger Survey by ONS

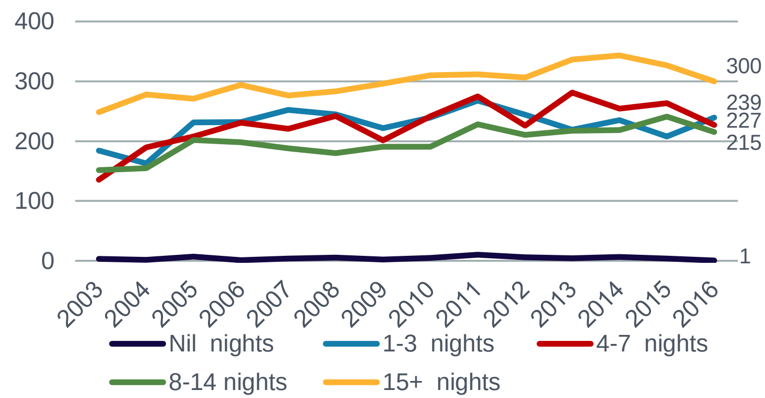
1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, 2016 (nights, %share)



Source: International Passenger Survey by ONS

Duration of stay trend (visits 000s)



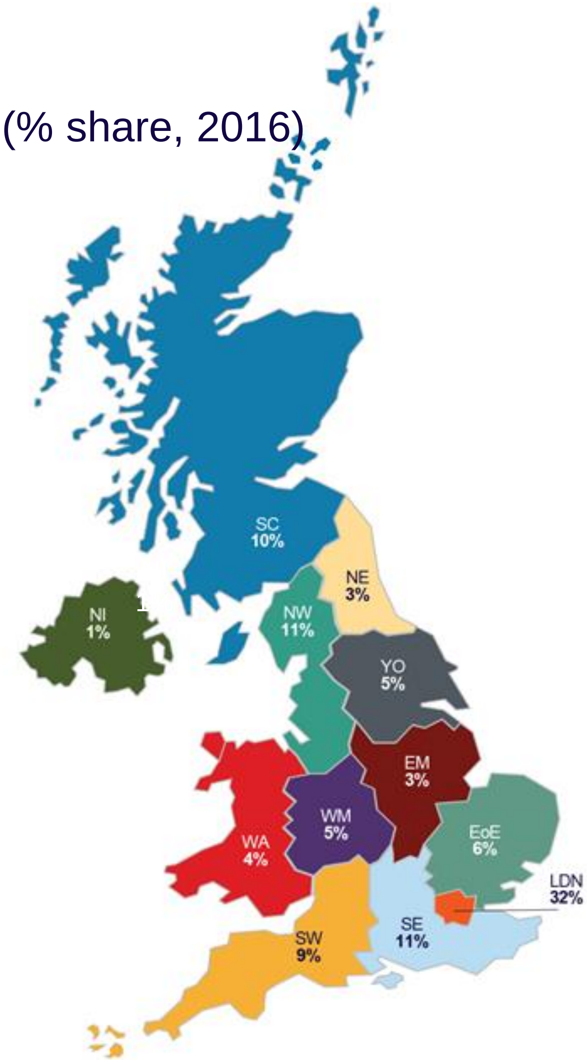
- Australian visitors tend to stay longer than most markets: in 2016 they stayed in the UK for 13 nights on average, compared to just 7 across all markets. This is driven by the high proportion of Australians staying for 15+ nights.
- The Australian inbound market to the UK is as much a VFR market as a holiday market. This can explain why over half of the nights spent by Australian visitors in the UK in 2016 were spent for free as a guest at friends' or relatives' places. This is followed as the most common accommodation type by hotel/guest house (21%).

1.1 Key statistics: regional spread

Visits to the UK (2016)

Region	Nights stayed (000)	Visits (000)
Total	12,912	982
Scotland (SC)	1,354	132
Wales (WA)	486	67
Northern Ireland (NI)	73	10
London (LDN)	4,148	600
North East (NE)	331	35
North West (NW)	1,365	133
Yorkshire (YO)	619	79
West Midlands (WM)	631	64
East Midlands (EM)	431	55
East of England (EoE)	825	80
South West (SW)	1,113	135
South East (SE)	1,422	184
Nil nights (Nil)	N/A	1

Nights (% share, 2016)



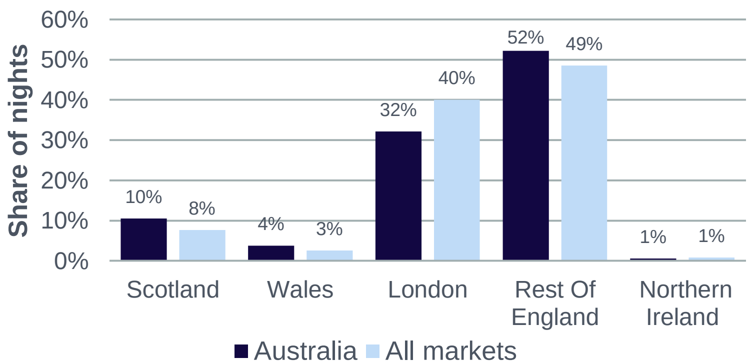
Source: International Passenger Survey by ONS. Visits data for nations and regions includes overnight stays, not day trips.

1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited (2014-2016)

Town	Average yearly overnight visits (000s)
London	615
Edinburgh	88
Glasgow	41
Manchester	37
Oxford	26

Regional spread 2016

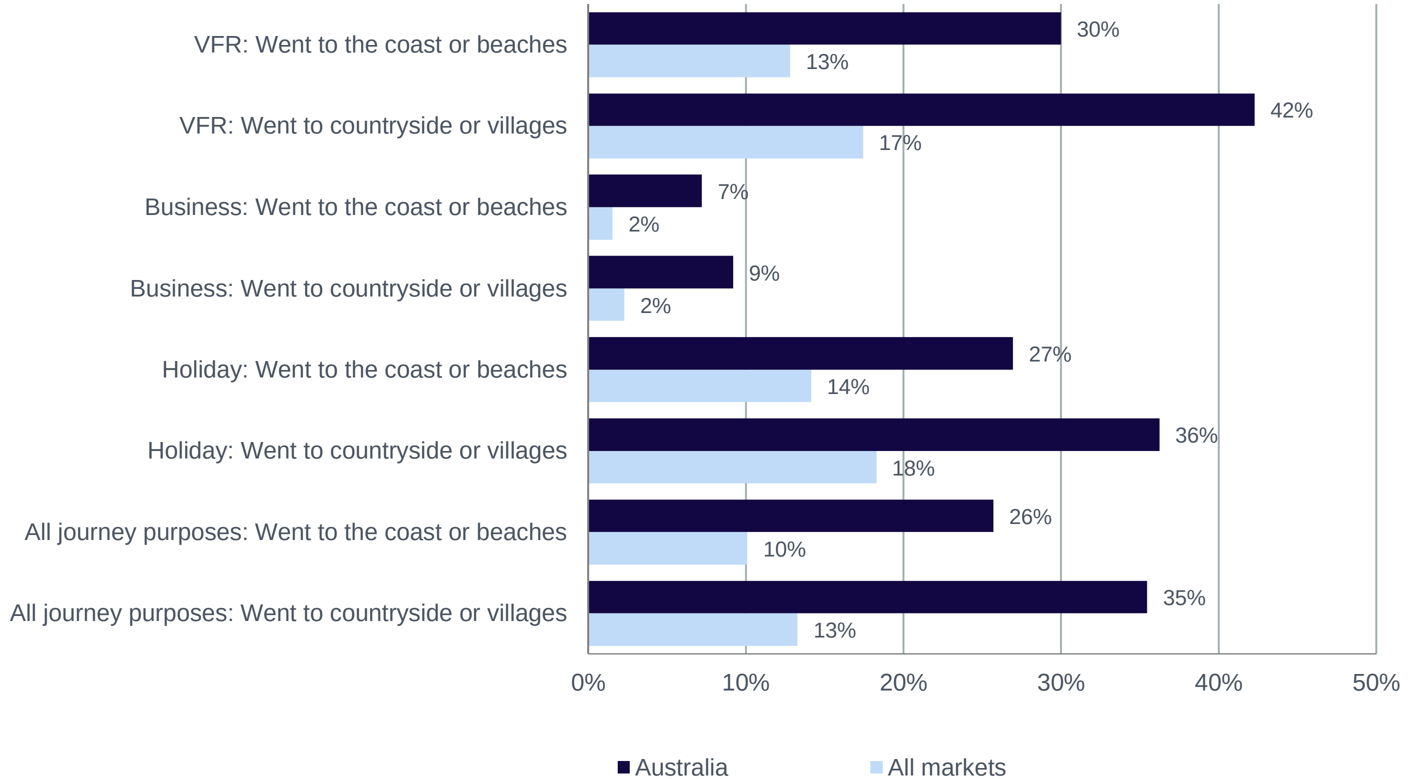


- London is the leading destination for a trip to Britain; in 2016 it accounted for 32% of Australian visitors' nights in the UK.
- 52% of nights from Australia were spent in regional England, i.e. outside London, in 2016, above the 49% from all markets.
- Australian millennials visiting the UK are more likely to visit London than Australian visitors aged 35+ (65% vs 58%). However, they are more likely than the average millennial inbound visitor to explore the country.
- Visitors from Australia have an above-average propensity to go to rural and coastal areas of Britain.
- 6% of all visits and 14% of holidays visits from Australia were bought as part of a package or an all-inclusive tour in 2016*, similar as the all-market average.
- Australian visitors are more likely than the all-market average visitor to hire a car. They are four times more likely to book this prior to their arrival in Britain than they are to arrange it once they are in the UK.
- They are also more likely to use the train to go around Britain more than other visitors; and they are more likely to buy their train tickets during their trip than to book it in advance.

*Source: International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors; *To be defined as a package, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.*

1.1 Key statistics: visits to coast, countryside and villages

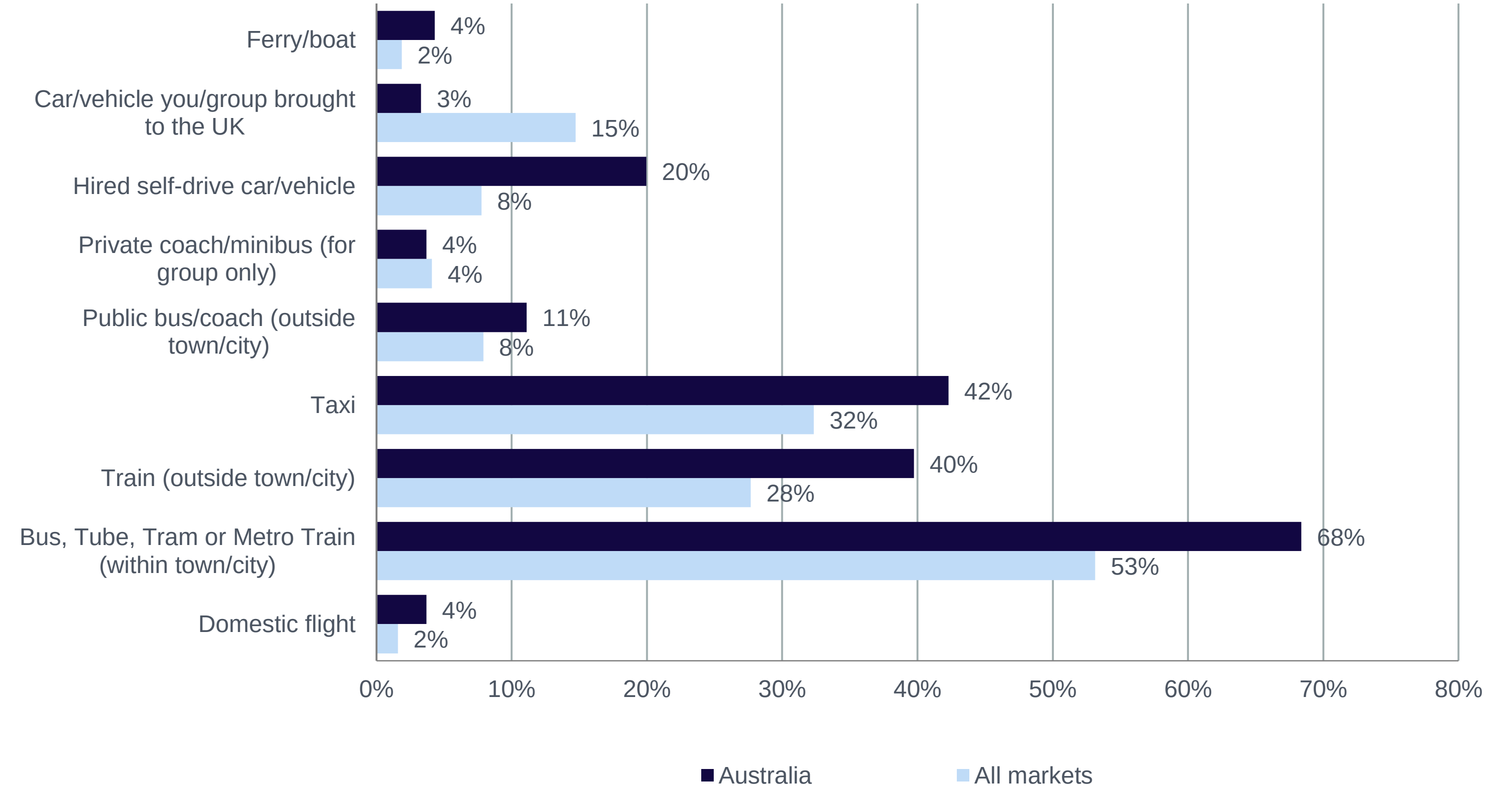
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.1 Key statistics: use of internal modes of transport

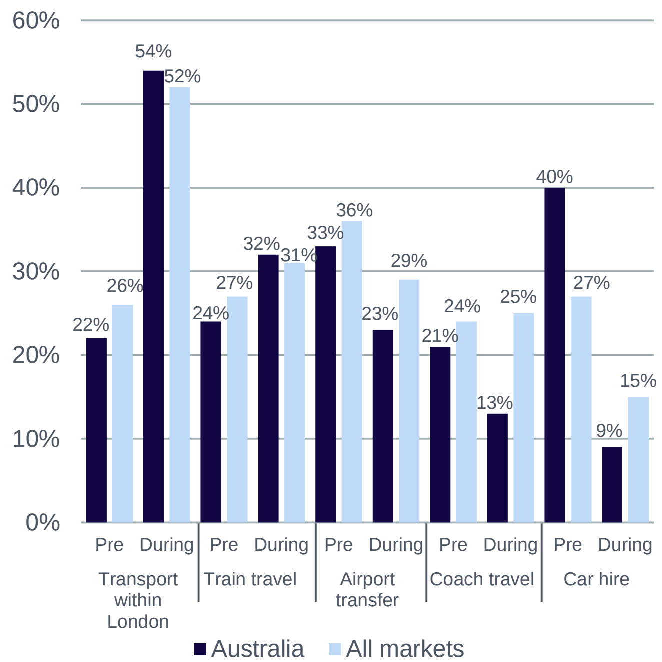
Propensity to use internal modes of transport



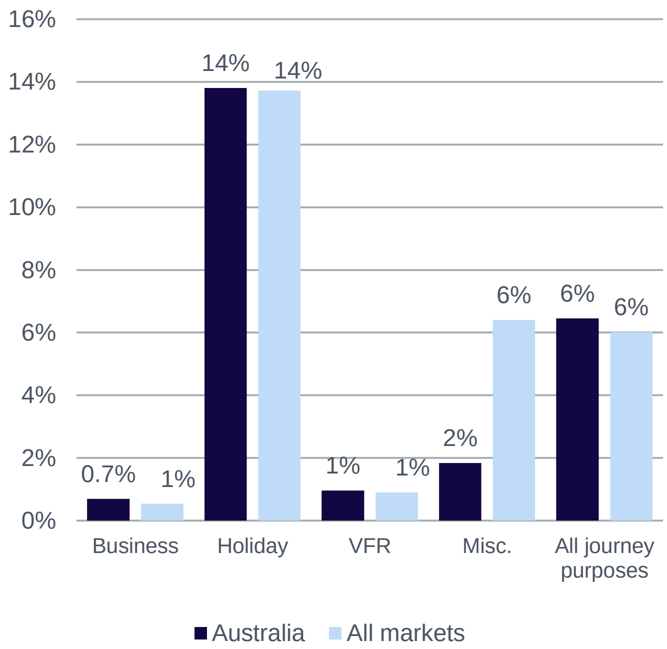
Source: International Passenger Survey by ONS, 2013

1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



Proportion of visits that are bought as part of a package or all-inclusive tour in 2016*



*International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors; *To be defined as a package, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.*

1.2 Visitor demographics

Visitor characteristics

- More visits from Australia to the UK were made by women than by men (54% vs 46% respectively).
- In 2016 there were as many visits made by Australian residents aged 25-34 years old than by those aged 45-54yo. Each of those age cohorts represent about 1 in 5 visits. There were few visits made by Australian children (0-15yo).
- 13% of the visits from Australia to the UK were made by British nationals, 81% by Australian nationals.
- In 2016 three-in-five holiday visitors were making a repeat visit to Britain (excluding British expats).
- 83% of departing Australian visitors are either ‘Very’ or ‘Extremely’ likely to recommend Britain for a holiday or short-break, while 80% of them felt ‘very’ or ‘extremely’ welcome in Britain.

68%

of Australian visits were made by people living in the Eastern states of Australia

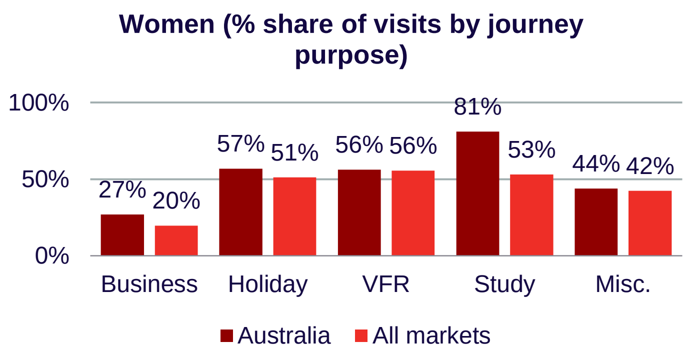
Source: International Passenger Survey by ONS, CAA 2016

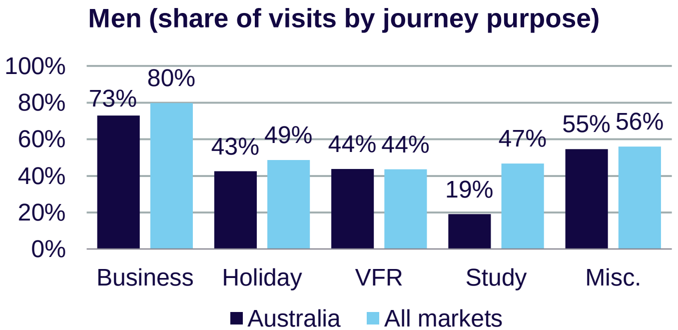
1.2 Visitor demographics: gender and age groups

Visitor demographics (2016):

gender ratio of visits from Australia:

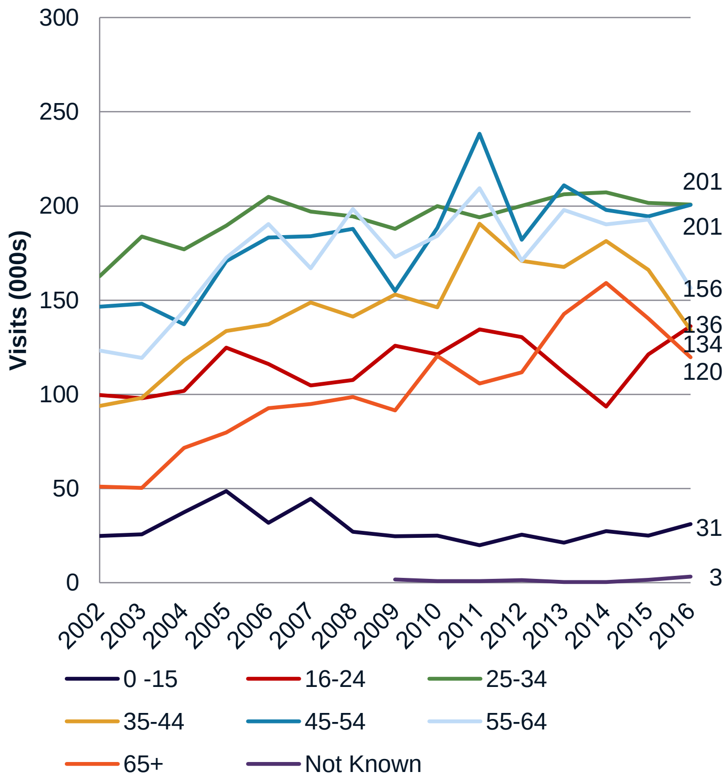
54% women, 46% men





Source: International Passenger Survey by ONS

Age group trend



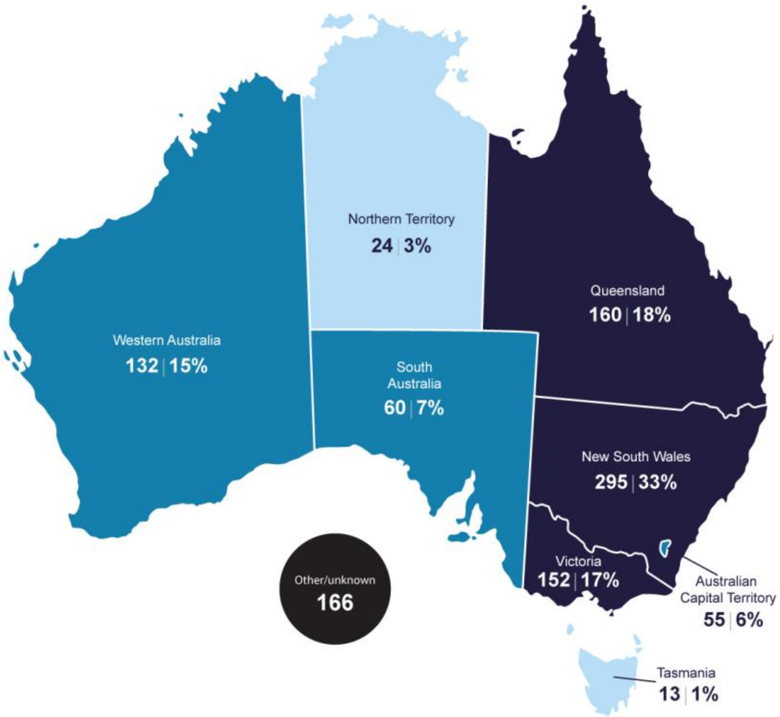
1.2 Visitor demographics: origin

Visits to the UK in 2014

- Most visits from Australia to the UK are made by visitors from the Eastern states.
- A third of the visits from Australia to the UK originate from New South Wales (NSW), followed by visits from Queensland (QLD, 18%), and Victoria (VIC, 17%), and Western Australia (WA, 15%).
- About 90% of Australians live in urban areas with the main ones being Sydney (NSW), Melbourne (VIC), Brisbane (QLD), Perth (WA), Adelaide (South Australia) and Canberra (ACT).

Visits in 000s | % share of visits

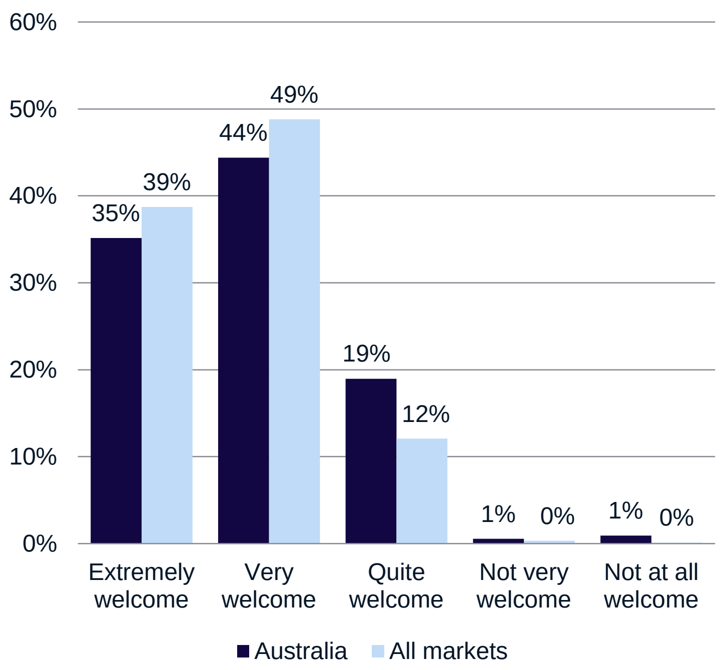
High
Medium
Low



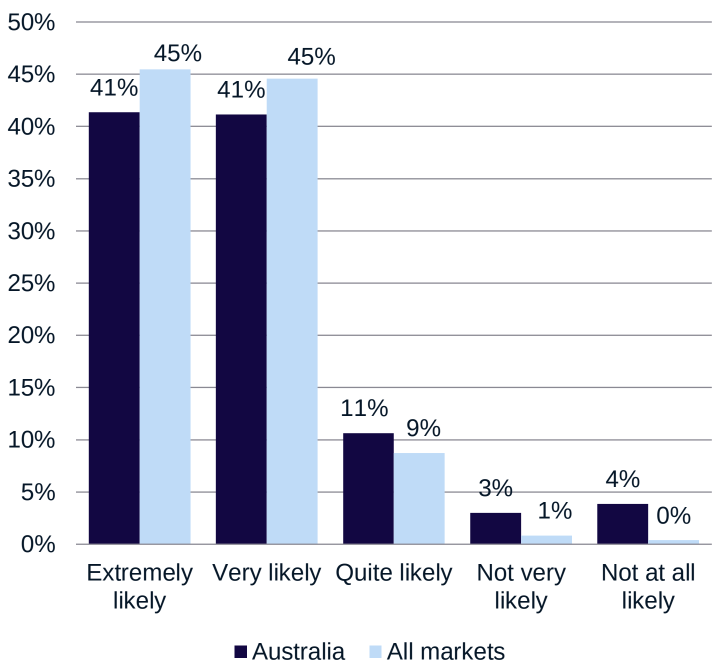
Source: International Passenger Survey by ONS, CIA World Factbook 2017

1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



Source: CAA 2016

1.3 Britain and competitors

Market size, share and growth potential

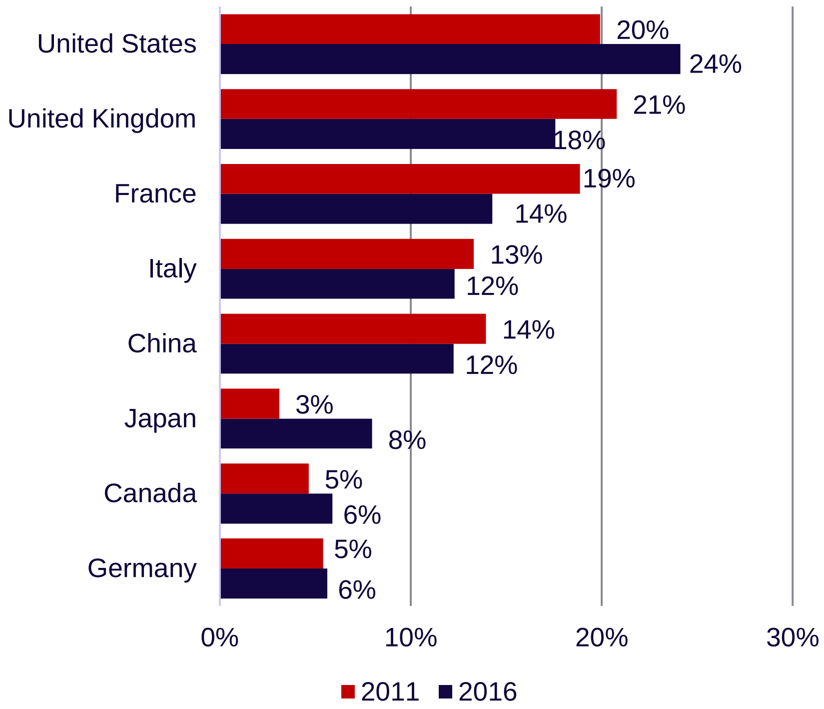
- Britain was the 4th most visited destination by Australian travellers for overnight trips in 2016, behind New Zealand, the USA and Indonesia.
- In the last few years, overnight visits to Britain from Australia have been flat, with Britain losing its ranking as the top international destination from Australia, which it held until 2006, to New Zealand. Britain's market share of the outbound Australian staying visitor market has decreased in the last 10 years, while some destinations have gained both in visits and market shares (Indonesia or the USA, for example).
- However, current forecasts suggest there is a strong potential for growth in the number of visits to Britain from Australia in the next ten years. This should help Britain gain back some market share and climb back to Australia's second most visited destination for overnight stays, just after New Zealand.

Britain ranks 4th
among Australian outbound destinations by volume

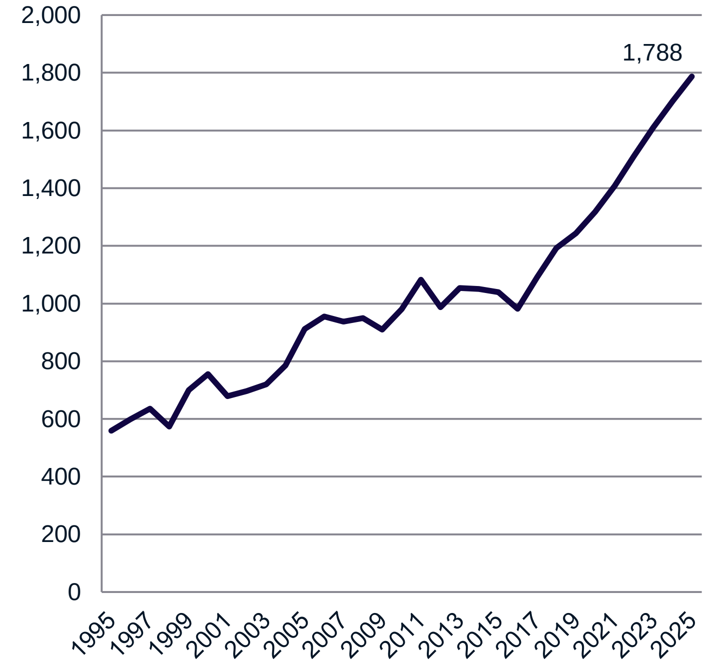
Source: Oxford Economics

1.3 Britain and competitors

Britain's market share of Australian outbound visits among competitor set



Historic and potential visits to Britain (000s)

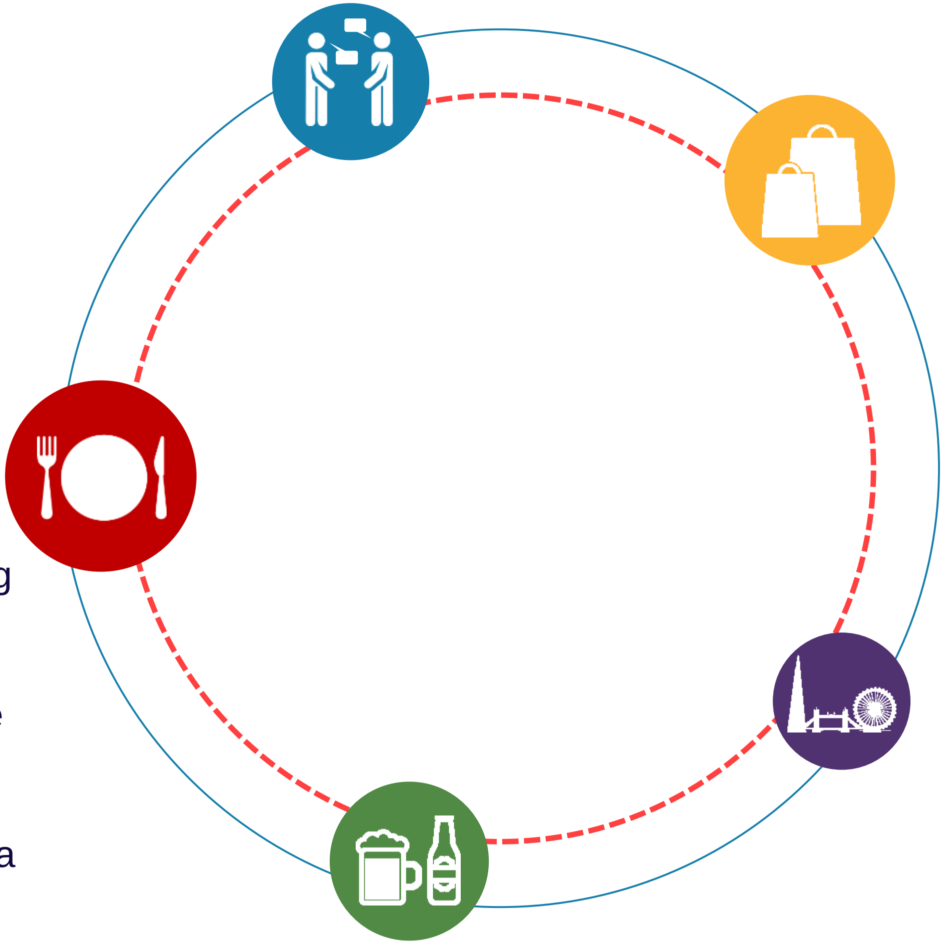


Source: Oxford Economics, based on overnight visit

1.4 Inbound activities

Inbound Britain activities

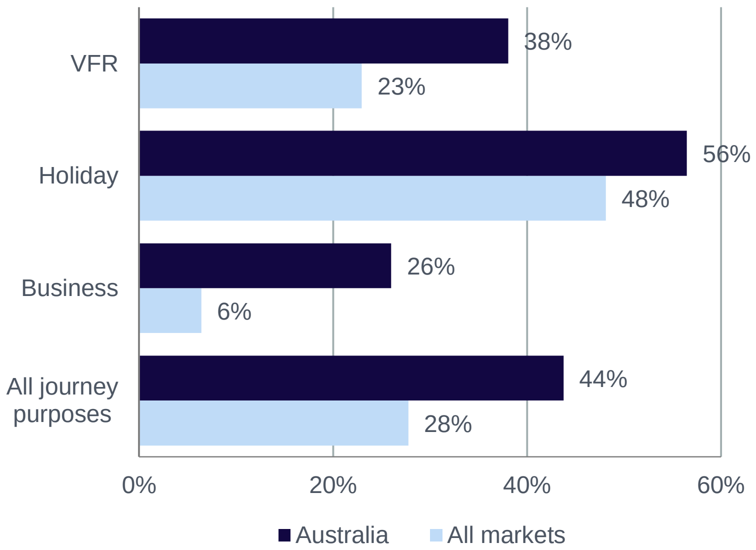
- Among Australian visitors, dining in restaurants is the most popular activity, followed by shopping and going to the pub. Socialising with locals and sightseeing famous monuments/ buildings also often feature in visits from Australia to the UK.
- Overall, they are more likely than the all-market average to participate in all sorts of activities in Britain: playing sports, undertaking cultural activities or sightseeing famous sites and monuments.
- There are also more likely to go shopping while in the UK than the all-market average visitor, with over half of Australian visits featuring buying clothing items or shoes.
- Australian visitors are more likely to watch a live football match than any other sports.



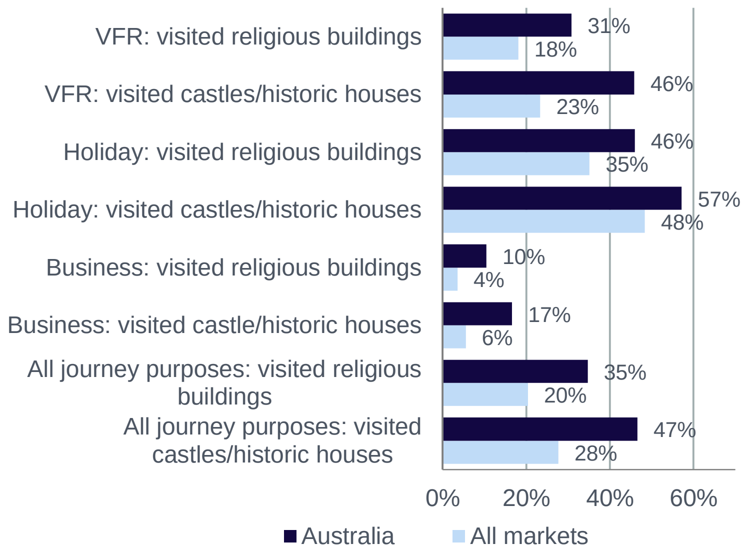
Source: International Passenger Survey by ONS, rankings based on 2006-2016 data

1.4 Inbound activities

Propensity to visit museums and galleries



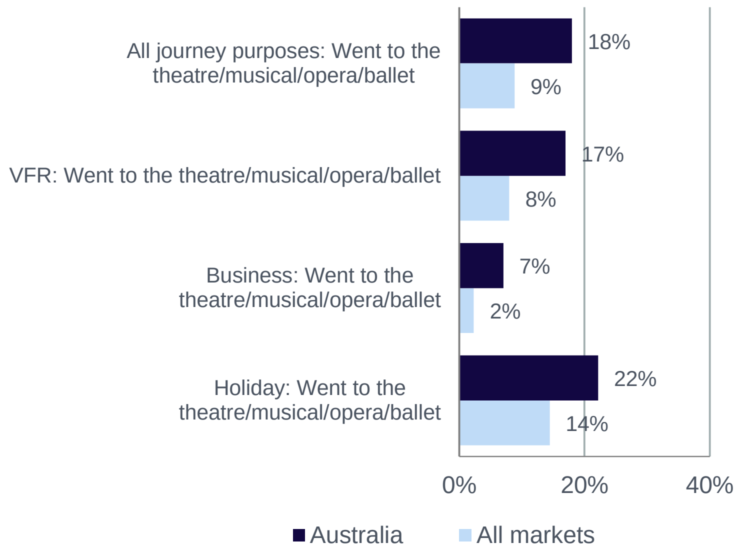
Propensity to visit built heritage sites



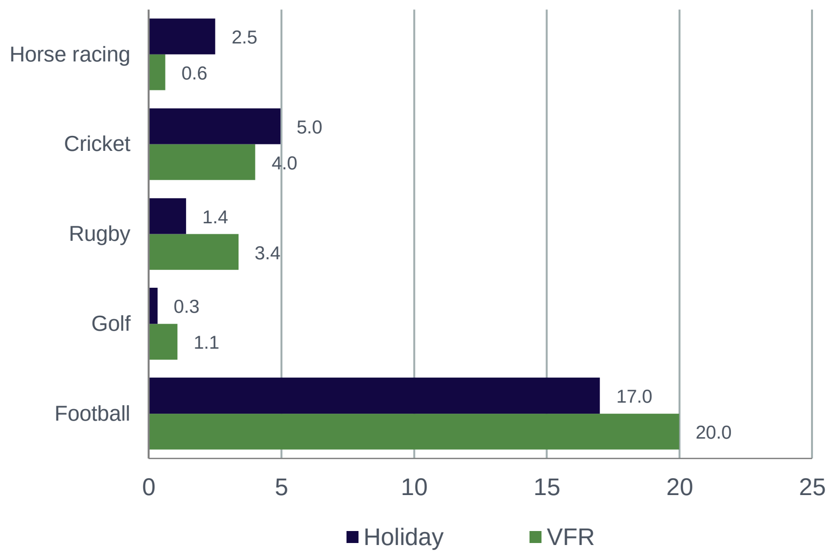
Source: International Passenger Survey by ONS 2016

1.4 Inbound activities

Propensity to attend the performing arts



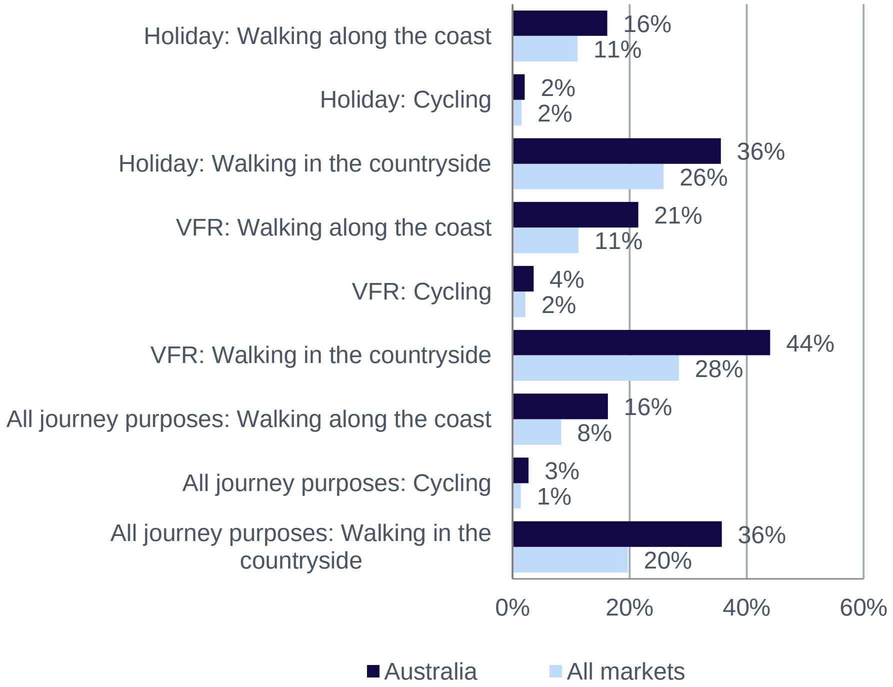
Number who went to watch live sports during trip from Australia to the UK.(000s)



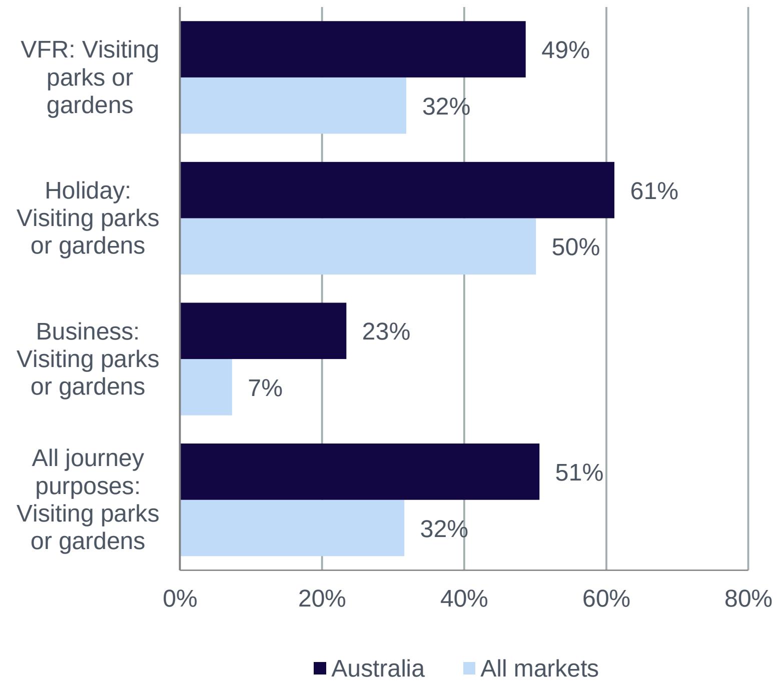
Source: International Passenger Survey by ONS 2011 and 2016

1.4 Inbound activities

Propensity to go for a walk or cycle



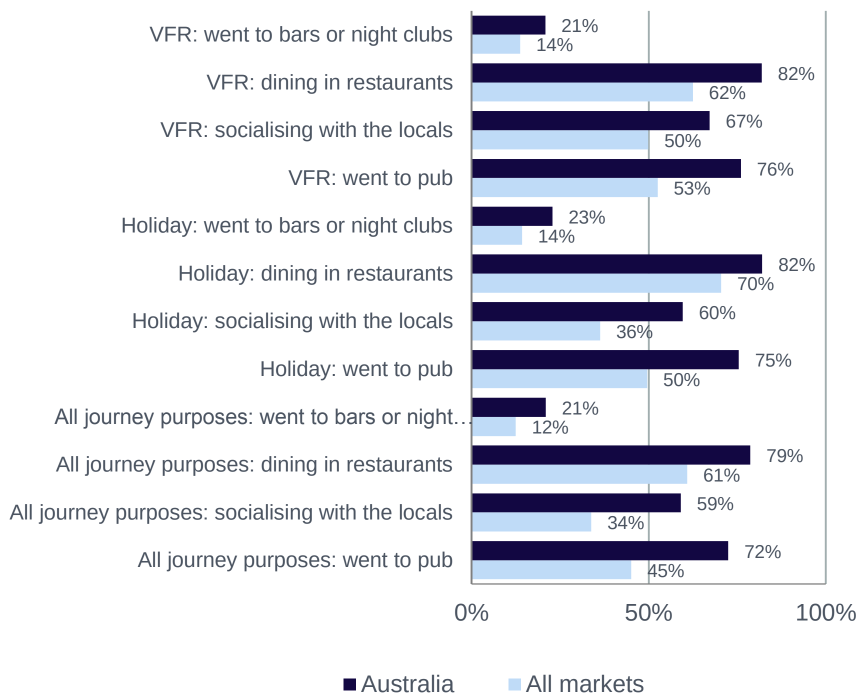
Propensity to visit a park or garden



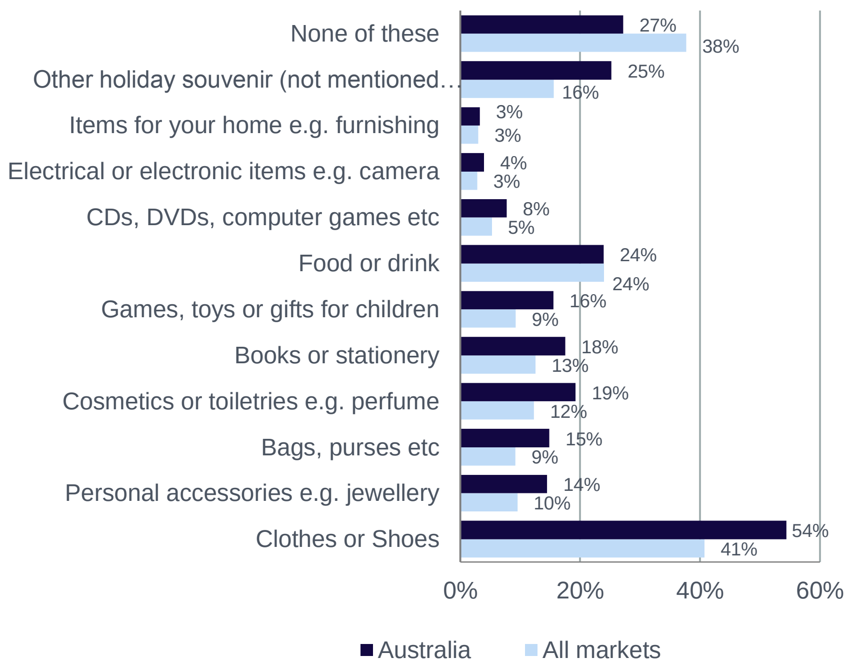
Source: International Passenger Survey by ONS 2007, 2010 and 2016

1.4 Inbound activities

Propensity to go to restaurants, go to pubs, and socialise with locals



Propensity to purchase selected items (%)



Source: International Passenger Survey by ONS 2007, 2008, 2011 and 2013

Chapter 2:

Understanding the market

2.Understanding the market

Chapter summary

- Australia is one of the largest countries in the world. As a consequence, Australians are used to taking long flights to get around their country, and are very familiar with long journeys.
- Britain is still a top destination for Australians: a large proportion of the population recognise themselves as descendants of British or Irish people. Australians usually hold favourable opinions of Britain too.
- Australians have a very long lead-in time: to benefit from cheaper fares, among other reasons, 7-in-10 Australian visitors had started thinking about their trip to Britain as early as 6 months prior to their departure, with close to 4-in-10 booking their trip in the same time frame.
- Australian travellers listen to advice from their friends and relatives, but are also influenced by reading other travellers' reviews on websites. Information from search engines is also well regarded as a source of information and influence.

Australians are among the most likely to visit the UK and be **staying at friends and relatives**

Source: Arkenford 2013, CIA World Factbook, VisitBritain/IPSOS 2016

2.1 Structural drivers

Demographics & society

- Australia has strong links with Britain: 26% of its population recognise themselves as descendants of English people, followed by 25% of Australian descendants, 8% of Irish descendants, and 6% of Scottish descendants.
- Australian is the 6th largest country in the world. It is divided in 6 states (New South Wales, Queensland, South Australia, Tasmania, Victoria, and Western Australia) and 2 territories (Australian Capital Territory – ACT, and Northern Territory).
- However, its population (24.3m in 2016) is concentrated in the cities (90%, 2017 estimate). Its major urban areas are: Sydney (4.5m), Melbourne (4.2m), Brisbane (2.2m), Perth (1.9m), Adelaide (1.3), Canberra (0.4m)*.
- Full-time workers are entitled to a minimum of 4 weeks of paid annual leave a year. In addition to those, there are 8 national public holidays, which are not inclusive of holidays specific to some states and territories.

90%
of Australian population live in urban areas

Source: Oxford Economics, CIA World Factbook 2017, www.publicholidaysaustralia.com.au
** Population data based on 2015 data for urban areas.*

2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2016 estimate
Total population (m)	24.3
Median age	39 years old
Population growth rate (2015-2020)	7%

Economic indicators (% growth unless stated)

Indicator	2016	2017	2018
Real GDP	2.5%	2.1%	2.3%
Real consumer spending	2.7%	2.4%	2.1%
Disposable income	3.3%	2.1%	3.2%
Consumer prices	1.3%	2.0%	2.4%

Source: Oxford Economics, CIA World Factbook 2017

2.1 Structural drivers: general market overview

General market conditions

- Australia is Britain's 10th largest source market in terms of visits and 4th most valuable, as of 2016.
- GDP is growing at a steady rate, with consumer spending growing at a slightly faster pace until 2017.
- There have been some signs of a slowdown with unemployment growing a little year-on-year in October 2017 (+0.3% on October 2016) and business confidence trending down slightly on average over the last two years.
- Australia has entered 2017 facing some challenges: after decades of sustained GDP growth, it had to face the end of the booming mining sector, and wage growth in general is sluggish. However services represent about 70% of the Australian GDP, and its banking system has been relatively untouched by the earlier crisis, remaining strong.
- Australia still ranks as the 9th largest source market of HNWIs* in 2016, with 255,000 HNWIs in 2016 (up 9% on 2015).
- The largest self-identified ancestry groups are English and Australian, each representing a quarter of the total Australian population, followed by Irish and Scottish.

Key demographic and economic data

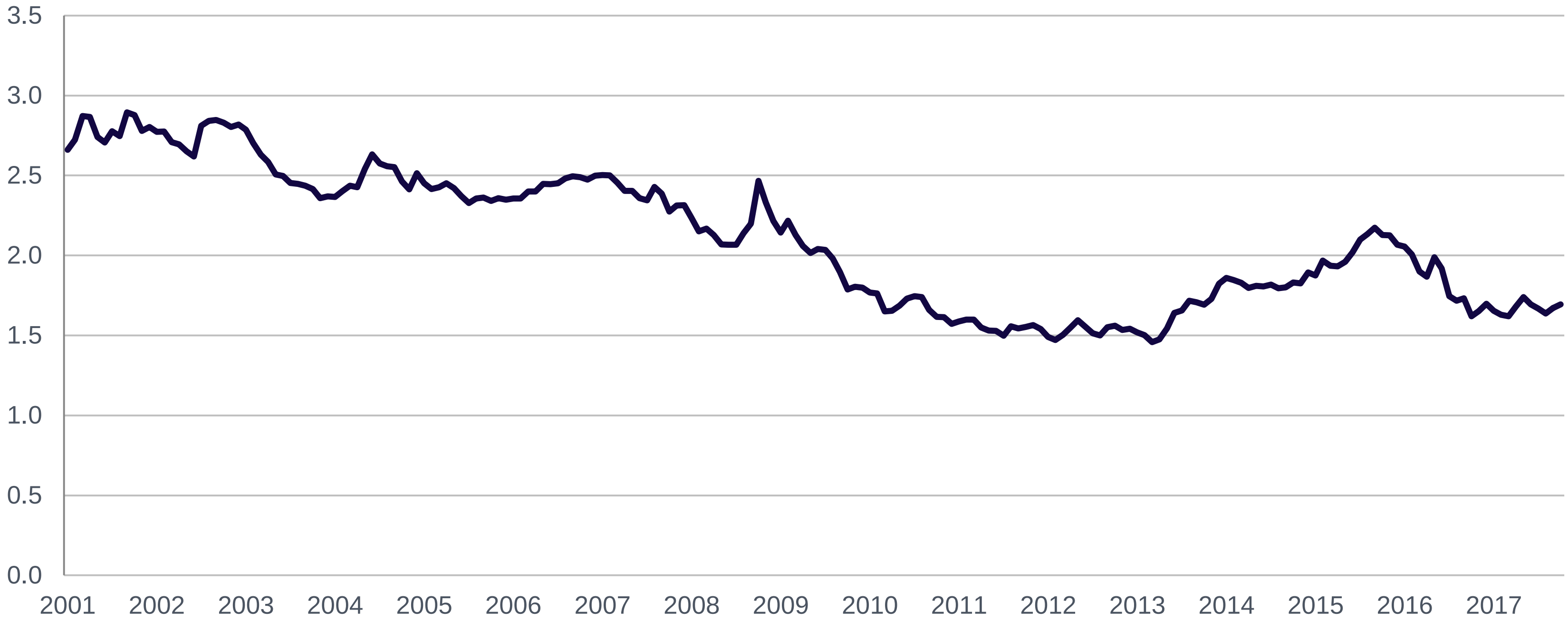
Measure (2016 data)	Australia
Population (m)	24.3
GDP per capita PPP (US$)	44,490
Annual average GDP growth over past decade (%)	2.7
Annual average GDP growth in 2016 (%)	2.5

Source: International Passenger Survey by ONS, Oxford Economics, CIA World Factbook 2017, Roy Morgan, Capgemini World Wealth Report 2017

**HNWIs: stands for High Net Worth Individuals, people whose liquid assets are worth US$1m or over*

2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in AUD)



Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source: Bank of England

2.2 Consumer trends

- About one-in-two Australians hold a passport, and 59% of these used theirs in 2016 to travel abroad.
- Some destinations in Asia have become increasingly popular in the last few years. As a consequence, the UK has lost some share of this outbound market. However, interest in visiting Europe, and the UK, is still strong: new Air Service Agreements enhancing connectivity to some European countries have recently been signed, and the UK remains in the top 3 destinations when Australians plan their overseas holidays.
- Australians tend to stay longer abroad than visitors from most markets. Among the main things they want from their holidays are to experience the most of their destinations, enjoy the landscapes, and having the possibility to meet the locals and undertake authentic activities. For that reason, multi-destination trips are quite frequent. Bad weather in the destination that will prevent them fully enjoying their planned itinerary is one of their main fears.

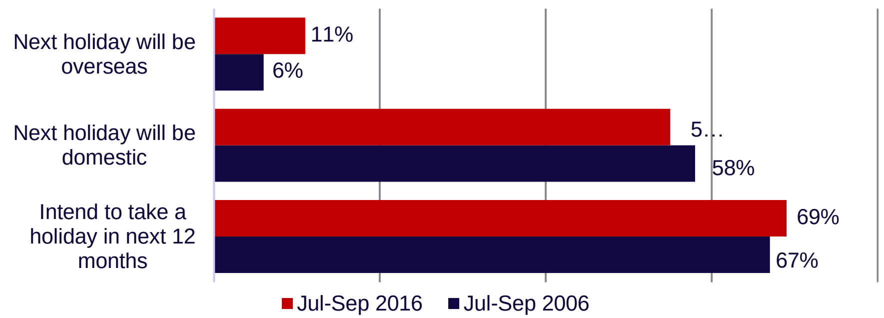
11%
of Australians plan their next holiday to be overseas

Sources: Australian Passport Office, Roy Morgan Research, Australian Department of Infrastructure and Regional Development, Skyscanner Travel Content Survey, HotelsCombined

2.2 Consumer trends: overall travel trends

Travel trends

- As of 2014, one in two (49%) Australians hold a passport, according to the Department of Foreign Affairs and Trade, an increase of 16% from 2009. In 2016/2017 the Australian Passport Office issued over 2 million passports, following a 5.5% increase in demand that year. It reflects the growing tendency of Australians to holiday overseas rather than domestically. Australia was one of the first countries in the world to introduce ePassports, incorporating biometric passport technology.
- The Australian passport is one of the most powerful in the world according to the latest 2017 Arton/Passport Index ranking. Because more and more destinations offer visa-free or visa-on-demand services for Australian visitors, the Australian Passport Office is set to discontinue the special frequent travellers' passport.
- According to Flight Centre data, 59% of Australians travelled internationally in 2016. Terrorism threats and rising geopolitical tensions have not deterred Australians from travelling.
- Despite a slowdown in visits to France and the US recently, Los Angeles though still tops overseas city destinations, along with London. Similarly, the US and the UK still appeal most to Flight Centre customers, just ahead of Indonesia and New Zealand. However, some destinations in Asia attract more and more Australian holidaymakers: Japan and India were among the destinations that increased most in popularity among bookings made at Flight Centre.
- Overall, overseas holidays are increasingly preferred by Australian holidaymakers, with growing intentions to travel overseas vs domestically, according to Roy Morgan:



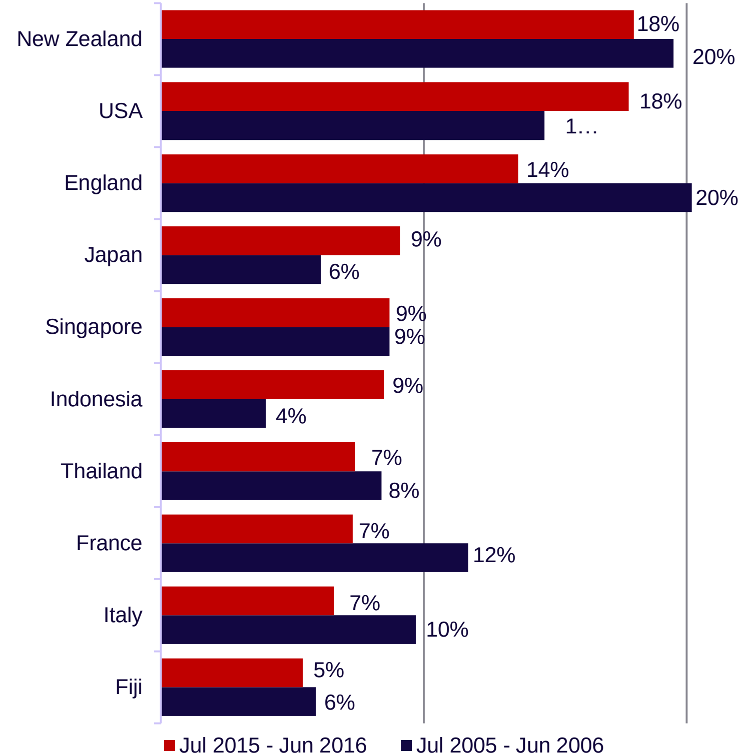
Sources: Australian Passport Office, Global Passport Power Rank 2017 by Arton/Passport Index, Flight Centre's 'Postcodes & Postcards: Australians on the move in the golden age of travel' report, Roy Morgan

2.2 Consumer trends: overall travel trends

Travel type and destination trends

- Other favourite and growing holiday destinations include South Pacific destinations such as New Caledonia. Those are Australians' favourite destinations for cruises, as the cruise market continues to extend in this market. According to the latest Cruise Lines International Association's 2016 Cruise Industry Report, Australia hit a new record last year with nearly 1.3 million Australian ocean cruise passengers, +21% on 2015. Australia remains the cruise market with the highest population penetration, with about 5.3% of Australians going on a cruise.
- Preferred holiday destinations have changed over the last ten years, according to Roy Morgan data. The USA, Japan and Indonesia have increased in popularity, while destinations closer to home struggled to maintain and more traditional destinations in Europe decreased in planning intentions.
- Nevertheless Europe is still on the map for Australian travellers: new air service agreements have recently been signed with countries such as Greece and Cyprus for example. Other destinations that have only seen few visits so far have also known some increase in popularity in the last years, such as countries in Northern Europe which benefit from growing food scenes, famous crime novels and outdoor activities.

Most popular destinations among Australians planning an overseas holiday



Source: Flight Centre's 'Postcodes & Postcards, CLIA's Cruise Industry source market report for Australia, 2016, Roy Morgan, Australian Department of Infrastructure and Regional Development, traveller.com.au

2.2 Consumer trends: motivation and attitudes to holidays

- Australians will book their travel far in advance: studies conducted by both Agoda and Skyscanner have revealed that Australian travellers are among the least spontaneous travellers, booking their holidays abroad well before other markets would do so, mainly as this offers cost saving possibilities.
- As 25-29 years olds are the ones travelling the most, ‘bleisure’, or the possibility to add a few days of holidays to a business trip, has become increasingly popular, more so than in other countries, according to Flight Centre.
- As Australian international travellers also want to make the most of their trips, Roy Morgan data also show that about a third of the Australians holidaying abroad visited multiple destinations during the same trip in 2016 (among holidaymakers over 14 years old). To fully enjoy that multi-destination trip, those holidaymakers would usually spend a longer time abroad (32 nights) and more money (AUD215 per person per night), compared to the average Australian holidaymakers (spending 6 nights on average away from home, and AUD160 per person per night). The Australians going on a multi-destination overseas holiday also tend to participate in the ‘experience economy’: 85% of them said that they like to ‘holiday where [they] can experience the local culture’.
- Experiencing the local life and enjoying authentic experiences are indeed big draws for most Australian travellers, ahead of any ‘adventures’ or outdoor activities, according to the recent Skyscanner Travel Content Survey.
- Looking at what would put Australian travellers off when on holiday, a study commissioned by HotelsCombined recently revealed that their top holiday dislike is having bad weather at their destination (29%), followed by flight delays and cancellations (19%). Also in the top ten, about one-in-ten Australian travellers quote the lack of planning when in destination.
- Nielsen has identified two main types of overseas travellers in Australia with different demographics, but still similar interest in experiencing the culture, through different ways: visiting historic sites and museums and enjoying local food specialities for those who would plan one long holiday overseas, or being surrounded by different people, culture, ideas and lifestyles for a older, but young-at-heart, more affluent group.

Source: Agoda, Skyscanner, Flight Centre’s ‘Postcodes & Postcards, Roy Morgan Holiday Tracking Survey, HotelsCombined ‘Aussies’ travel peeves’ study, Nielsen

2.3 Booking and planning

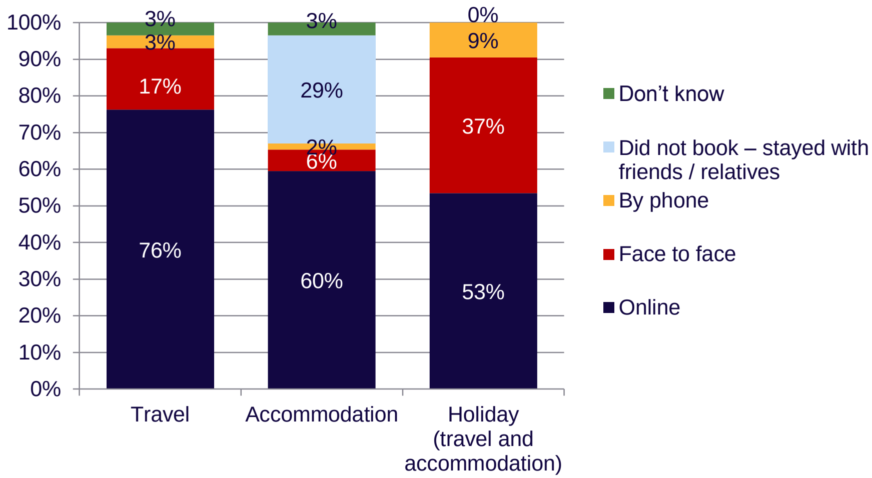
- Australian visitors have very long lead-in times compared to most other inbound markets.
- 7 out of 10 Australian visitors starting to think of their holidays 6 months or more prior to their trip, and about 6-in-10 decided on Britain as their destination in the same time frame.
- Over a third had even booked their trip 6 months or more in advance, and another third had booked it between 3 and 6 months ahead of travelling.
- They are savvy travellers who are not afraid of booking the separate elements of their trips directly with the transport and accommodation providers.
- They are the second-most likely inbound market to stay with friends or relatives when visiting the UK among 20 markets, just after their neighbour, New Zealand.
- When booking the different elements of their trip separately, they mainly book online. However they are more likely than the global average to book a holiday package or transport alone face-to-face.

Source: VisitBritain/IPSOS 2016

Over half
of Australian visitors had decided for Britain as their holiday destination 6 months or more before their trip

2.3 Booking and planning: booking channels and ticket sales

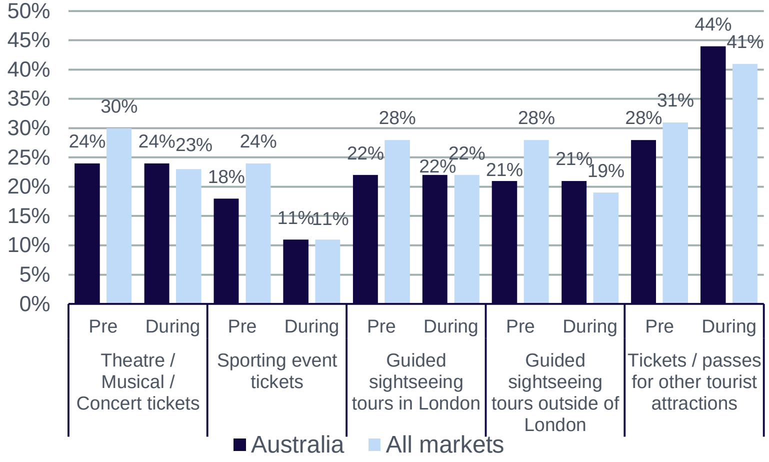
How trips to Britain were booked



- Australian visitors are quite digital-savvy, with a majority of them booking their trip, as a package or different elements of it, online, especially when booking their travel separately.
- However, they are also more likely to book their travel or holiday face-to-face than the global average (17% vs 11% and 37% vs 27% respectively).
- Only New Zealand visitors would be more likely to stay with friends/relatives than Australian visitors.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

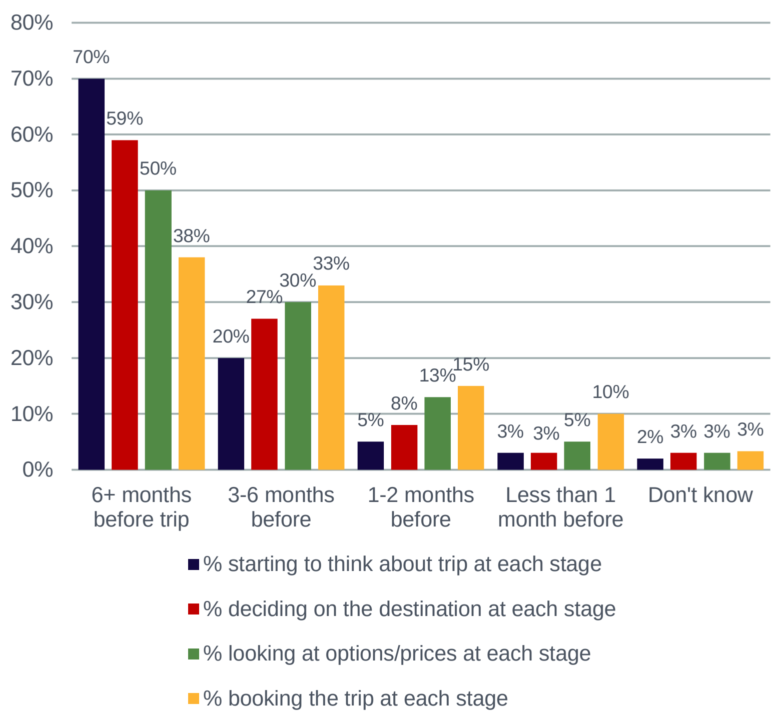
Propensity to make a purchase before or during trip



- Overall, Australian visitors tend to have purchased fewer activities to undertake in the UK than the global average.
- Despite 72% of Australian visitors liking to plan carefully their holidays before they leave, they would only be more likely to have purchased sporting event tickets before their trip rather than during their visit to Britain.
- Tickets or passes for miscellaneous tourist attractions are the one thing they are most likely to have purchased across all categories.

2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



Source: VisitBritain/IPSOS 2016, base: visitors

- Australian visitors have longer lead-times than the global average for all stages of the planning and booking of their visit to the UK.
- Seven out of ten Australian visitors start to think about their trip to Britain early, 6 months or more beforehand, compared to about one-in-two on average globally.
- Australians made their decision to visit Britain even further ahead of the global average with 59% doing so in the same time frame, 6 months prior to their trip, compared to 32% for the global average. A further 27% of Australian visitors did so between 3 and 6 months before their departure.
- Half of Australians had looked for options and prices as early as more than six months prior to the trip, and an additional 30% did so between three and six months before. This compares with only 58% of all visitors doing so three months or more before departure.
- Finally a quarter of the bookings to Britain were made by Australian visitors less than two months before their trip, against about half of previous visitors on average across all markets.
- When booking transport to Britain and accommodation for their stay there, they are more likely to do so directly with the service provider (55% and 60% of Australian visitors respectively) rather than through an intermediary.

2.4 Reaching the consumer

- Print media is still very important in Australia. However, readership of both newspapers' and magazines' online versions are growing more than readership of their paper equivalents. Only a handful of newspaper titles are nationwide, with most titles being distributed in one state.
- The broadcast media landscape has also been changing in the last few years: radio is still Australians' preferred media at breakfast time, but it is more and more listened to online.
- Home TV sets are also increasingly connected, which allows Australians to increasingly use them for other purpose than watching live programmes. The arrival of Netflix in 2014 boosted SVOD services (Subscription Video-On-Demand), which only have restricted options for advertisement.
- Digital broadcast on platforms such as YouTube is very important for this market. Social media shows growing penetration rates too.
- Finally, mobile use related to travel search and booking is not as developed as for other Asian markets.

Digitalisation
of content is key as newspapers, magazines, radio and video broadcasts are often read, listened to and watched online

Source: Roy Morgan Research, Nielsen (Australian Video Viewing Report Q2 2017, Australian Multi-Screen Report Q4 2017), Amadeus/YouGov research, Sensis Social Media Report 2017

2.4 Reaching the consumer: 'print' media

- Newspapers and magazines are still highly relevant media in Australia. The main mastheads have both print and digital versions, but at the moment it is mostly the digital versions that are seeing readership increase. Cross-platform audiences are steady, according to the Roy Morgan readership report for Australia for the 12-month period to June 2017. As a consequence, Australians read more and more content on digital platforms, rather than traditional print versions.
- PWC Australia's 'Entertainment and Media Outlook 2017-2021' forecasts some strong issues for print magazines most of all, with CAGR forecasts over that period around -10% in total, and -7.6% in advertising.
- The market is also quite concentrated with main publishers such as News Media, Fairfax Media or Bauer controlling most newspapers titles and above half of the magazine titles. Bauer closed two magazine titles in a week alone in November 2017. Consolidation and cross-platform transition are key to survival as close to 65% of Australians aged 14 or over are now reading or accessing newspapers each week, either in print format, or online via website or app, on average over the 12 months to June 2017. In that period 9 mastheads had increased their digital readership while 3 had increased their print readership, reaffirming the growing preference towards digital content.

Newspapers

Main titles by cross- platform readership in September 2017 (area of circulation for print)	
1. Sydney Morning Herald (NSW)	5. The Australian*
2. Daily Telegraph (NSW)	6. Courier-Mail (QLD)
3. Herald Sun (VIC)	7. Financial Review*
4. The Age (VIC)	8. West Australian (WA)

*nationwide titles

Magazines

Main titles by print readership in September 2017 (% of 14+ population)	
1. Coles Magazine (20%)**	5. Women's Daily (6%)
2. Fresh (19%)**	6. New Idea (6%)
3. Better Homes and Gardens (9%)	7. Open Road (NSW, 5%)
4. Women's Weekly (7%)	8.National Geographic (5%)

Excluding magazines inserted in newspapers, **only in print ranking, cross-platform would show Taste.com.au as largest readership

Source: Roy Morgan' 12-month readership report for Australia to June 2017 and to September 2017, PWC Australia's 'Entertainment and Media Outlook 2017-2021

2.4 Reaching the consumer: broadcast media, radio and digital

Blurring limits between traditional and online media

- All media are affected by digital content: even radios tend to be more and more listened to online. It is still the preferred media at breakfast time, but more Australians access it via the radio's website or app.
- The same goes for broadcast media: in April-June 2017, 20 million Australians (about 84% of the population) watched broadcast TV each week (free-to-air and subscription channels) on in-home TV sets.
- While the number of household TV sets fell slightly in 2017 compared to 2016, the average numbers of mobile phones, tablets, and computers at home have increased. Furthermore, household TV sets are now more and more connected so TV use has also changed, and now includes more catch-up TV services, gaming, and SVOD (subscription video-on-demand) services, with Netflix and STAN driving that market. Live TV shows that remain popular include cooking and renovation shows.
- Netflix launched on the Australian market only in 2014 but has grown considerably to become a dominant SVOD player. Those players make it more difficult for advertisers as they act as locked advertising platforms. Nonetheless, some of their original content has boosted Britain's profile to a certain audience, like The Crown, as shows aired on free-to-air TV continues to do – Downton Abbey was one of the TV shows generating most engagement.

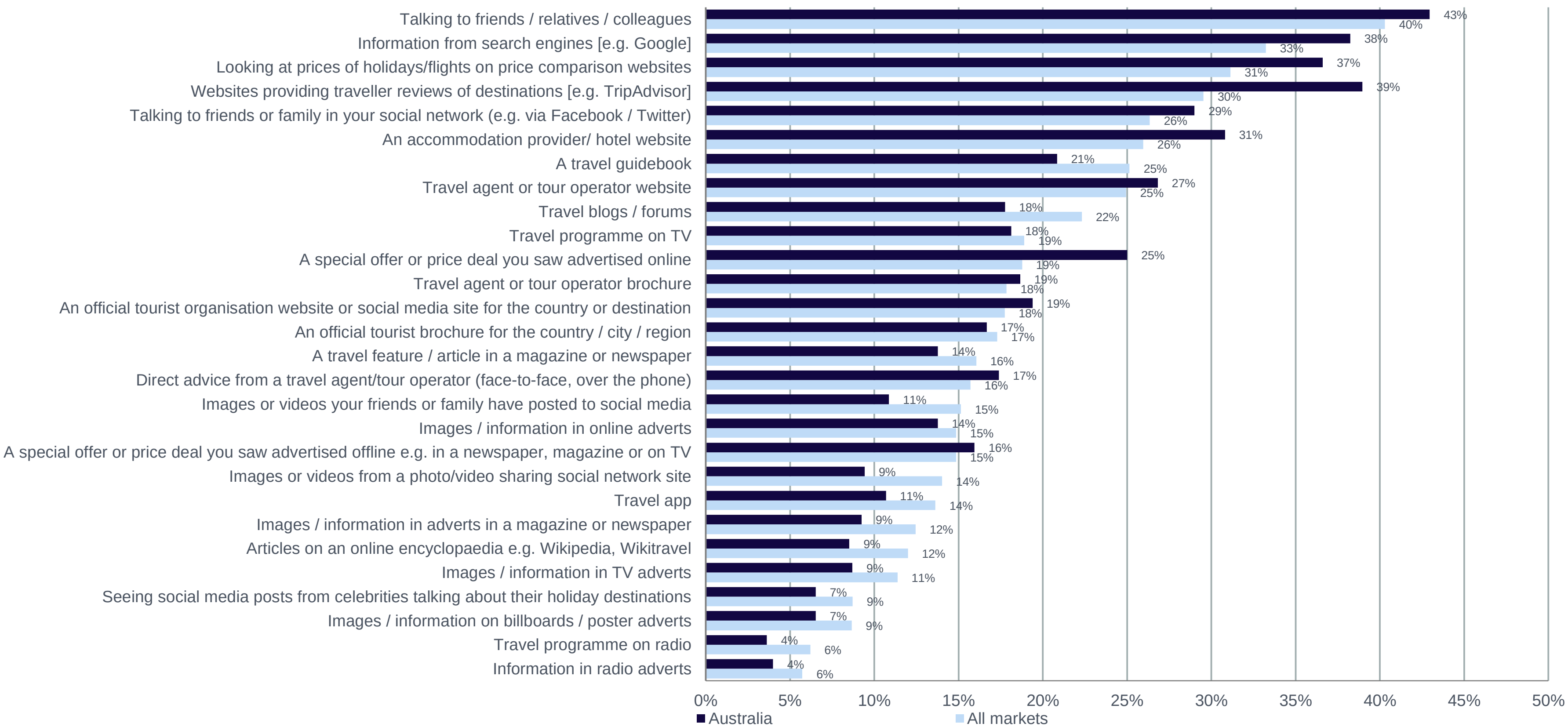
Internet/Digital & Social Media

- Digital content is increasingly preferred to other forms; however, Australia is not a 'mobile first' market, at least not for travel. Recent research by Amadeus and YouGov, showed that most Australians still research and book their holidays on a laptop or a desktop computer.
- As ownership of mobile devices but also laptop/desktop computers increase in Australian households, YouTube has become a valid broadcast channel and search engine.
- The top digital travel publishers in Australia are Google, nine.com.au, Yahoo!, news.com.au and the Fairfax platforms.
- Social media are also increasingly important as they are used by more Australians than before, and more frequently. Sensis Social Media report reveals that about 8-in-10 Australian Internet users had a social media profile in the first months of 2017, with 59% using them daily. The top 3 reasons to use them are: catching up with friends and family, sharing photos and videos, and watching videos. Facebook still dominates with 94% of social media users having a profile.

Source: Roy Morgan Research, Nielsen (Australian Video Viewing Report Q2 2017, Australian Multi-Screen Report Q4 2017), Amadeus/YouGov research, Sensis Social Media Report 2017

2.4 Reaching the consumer: influences

Influences on destination choice



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

2.5 Perceptions of Britain

- When asked the most important reasons for choosing Britain as a holiday destination, cultural attractions and the possibility to visit friends or relatives are clearly the two main reasons why Australian visitors did so. In fact twice as many Australian visitors picked the latter motivation to visit as the global average.
- Australians look for a holiday destination that will get them good value for money, provide fun and laughter and that they can explore. For the latter, they consider Britain to be the best destination among those presented, while they think the US would best deliver on the former two of their holiday 'wants'.
- Britain is also ranked above some competitor destinations for being a place with lot of history and historic sites. Australians rate Britain as the top destination to visit these iconic places.
- Australians also have a strong emotional link with Britain: it is where over a third of them can revisit places of nostalgic importance to them, or visit places linked to their family history.
- Overall Australians hold very good, above average perceptions of the UK, and rank it well above the global average for its visitors' welcome (ranking Britain 4th, vs Britain's global average rank of 13th).

Biggest draws for Australian holiday visitors:
Cultural attractions and the possibility to visit friends or relatives

Source: Arkenford 2013, VisitBritain/IPSOS 2016, Anholt-GfK Nation Brands Index 2017

2.5 Perceptions of Britain

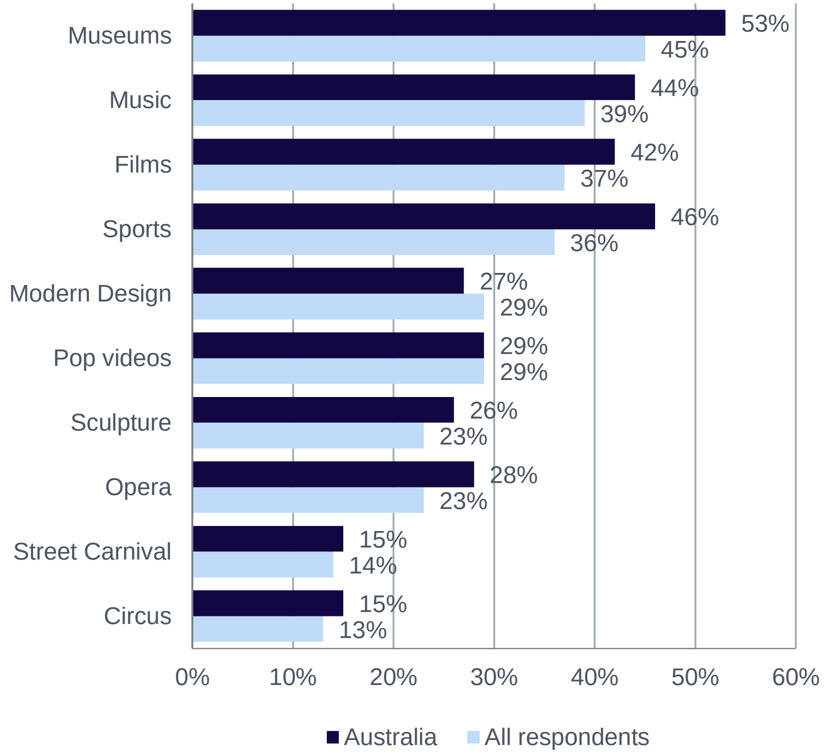
Britain's ranking (out of 50 nations)

Measure	Australian respondents	All respondents
Overall Nation Brand	**2**	**3**
Culture (overall)	**2**	**5**
The country has a rich cultural heritage	5	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	3	3
The country excels at sports	3	4
People (overall)	**4**	**6**
If I visited the country, the people would make me feel welcome	4	13
Tourism (overall)	**2**	**3**
Would like to visit the country if money was no object	4	6
The country is rich in natural beauty	15	24
The country is rich in historic buildings and monuments	5	5
The country has a vibrant city life and urban attractions	3	4

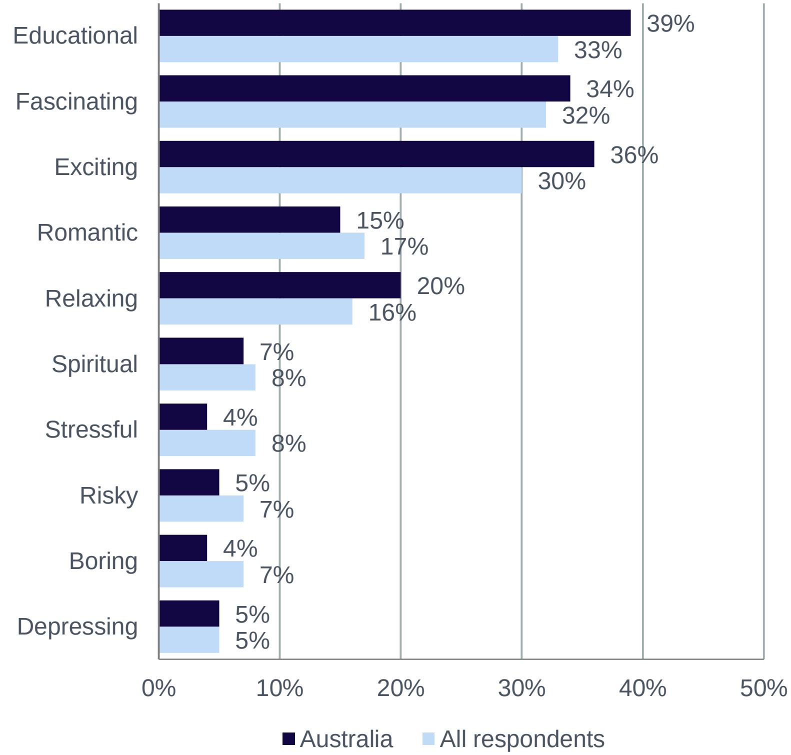
Source: Anholt-GfK Nation Brands Index 2017

2.5 Perceptions of Britain

Cultural associations



Adjectives describing a potential trip to Britain



Source: Anholt-GfK Nation Brands Index 2017

2.5 Perceptions of Britain

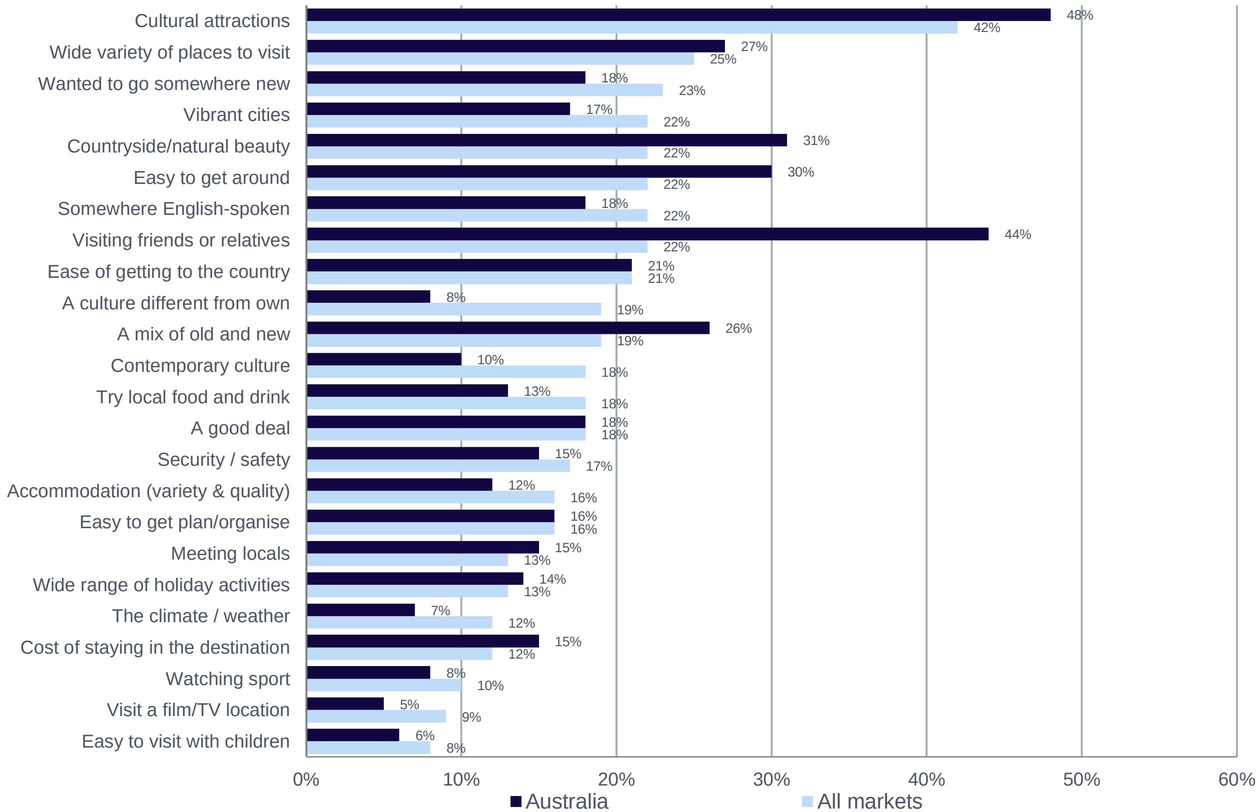
Holiday wants and % saying destination is best place for…

Importance		GB	FR	IT	NL	US	GE
5.92	Offers good value for money	15%	12%	16%	11%	30%	10%
5.89	Have fun and laughter	17%	9%	12%	11%	29%	8%
5.83	Explore the place	31%	24%	28%	13%	26%	15%
5.82	Enjoy the beauty of the landscape	29%	38%	43%	23%	30%	25%
5.76	The people are friendly and welcoming	25%	16%	24%	20%	29%	14%
5.71	Experience things that are new to me	24%	28%	33%	28%	27%	27%
5.67	Enjoy local specialities (food and drink)	11%	51%	55%	17%	15%	22%
5.62	See world famous sites and places	47%	49%	54%	17%	36%	29%
5.60	Soak up the atmosphere	26%	34%	41%	12%	22%	8%
5.52	Do something the children would really enjoy	24%	25%	21%	18%	61%	18%
5.49	Broaden my mind/ Stimulate my thinking	30%	31%	34%	21%	28%	23%
5.48	It offers unique holiday experiences	29%	33%	37%	25%	37%	24%
5.44	Provides a wide range of holiday experiences	34%	29%	32%	19%	50%	22%
5.43	Visit a place with a lot of history/historic sites	55%	45%	50%	16%	19%	33%
5.39	Do what I want when I want spontaneously	18%	17%	23%	12%	22%	9%
5.39	Enjoy peace & quiet	15%	17%	18%	16%	8%	7%
5.35	A good place to visit at any time of year	17%	21%	24%	12%	31%	12%
5.33	Chill/ slow down to a different pace of life	9%	17%	20%	10%	12%	6%
5.33	Easy to get around by public transport	37%	21%	16%	15%	30%	20%
5.29	Experience activities/places with a wow factor	29%	41%	40%	19%	40%	19%
5.28	Enjoy high quality food and drink (gourmet food)	13%	52%	46%	12%	17%	20%
5.22	Be physically healthier	17%	22%	21%	19%	18%	16%
5.21	Have dedicated time with my other half	32%	38%	33%	19%	26%	17%
5.09	Feel special or spoilt	12%	23%	25%	18%	14%	5%
5.07	Meet the locals	25%	9%	9%	18%	39%	15%
5.06	Feel connected to nature	13%	19%	21%	13%	16%	17%
5.03	Get some sun	10%	17%	31%	13%	37%	8%
5.01	Revisit places of nostalgic importance to me	33%	14%	18%	8%	23%	15%
4.87	Good shopping	21%	34%	30%	9%	48%	8%
4.73	Get off the beaten track	9%	5%	10%	9%	15%	20%
4.69	Visit places important to my family's history	42%	16%	14%	9%	14%	7%
4.43	Meet and have fun with other tourists	21%	40%	29%	13%	38%	12%
4.15	Do something environmentally sustainable/ green	22%	16%	15%	15%	14%	12%
4.12	Go somewhere that provided lots of laid on entertainment/nightlife	34%	32%	31%	27%	50%	23%
4.07	Experience adrenalin filled adventures	11%	18%	17%	10%	44%	3%
4.00	To participate in an active pastime or sport	19%	23%	18%	20%	31%	20%
3.92	Do something useful like volunteering to help on a project	24%	6%	16%	8%	23%	12%
3.84	Party	24%	9%	11%	17%	44%	12%
3.80	Fashionable destination	27%	47%	44%	10%	32%	14%
3.62	Watch a sporting event	34%	14%	15%	13%	44%	18%

Source: VisitBritain/Arkenford 2013

2.5 Perceptions of Britain

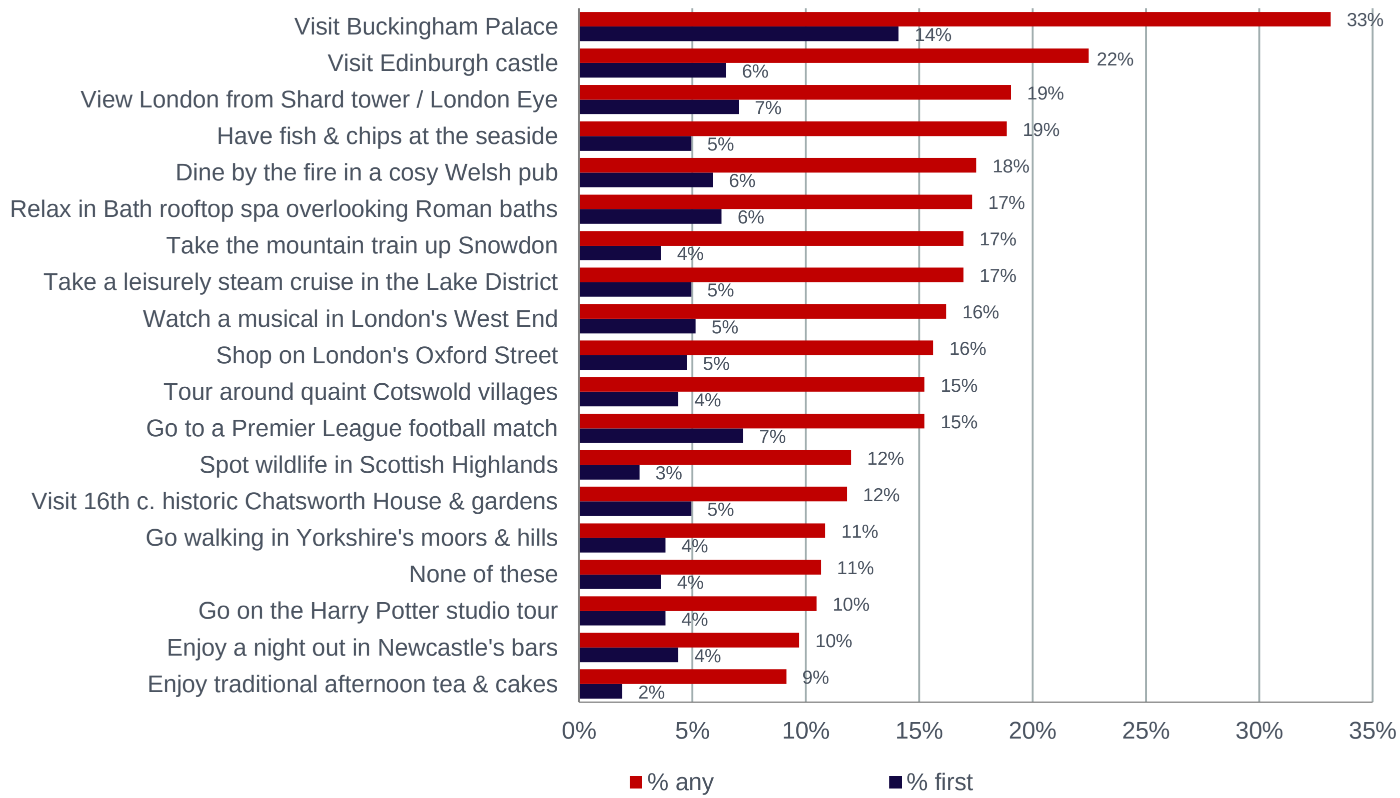
Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, base: visitors (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

2.5 Perceptions of Britain

Sought-after Britain activities



Source: Anholt-GfK Nation Brands Index 2013; If you went on a holiday/vacation to Britain which of the following activities would you most like to do? Please choose a first, second and third choice

Chapter 3:

Access and travel trade

3. Access and travel trade

- Most Australian visits to the UK were made by plane (81%).
- A further 10% of visits were made through the tunnel (just 2% down on the all-market average), hinting at a combined itinerary with another European country. Australian visitors coming through the tunnel had either embarked on the Eurostar or on a coach, as arriving in a private vehicle to the UK is quite rare (only 2%).
- Direct seat capacity is not truly representative of the market's access to Britain: direct flights stop in Dubai or Singapore but Australian travellers would also consider connecting routes through hubs in the Middle East and Asia.
- Two airlines only serve direct, stoping routes between Australia and Britain: British Airways and Qantas. Those flights depart from Sydney and Melbourne and arrive at London Heathrow.
- For long-haul travel most Australians will still turn to agencies to plan all or parts of their trips. The Australian travel trade is quite concentrated.

Connecting routes
between Australia and the UK are key as there are no direct, non-stopping routes

Source: Apex Rdc 2016, International Passenger Survey by ONS

3.1 Access: key facts

- Most Australian visitors came to the UK by plane, although one-in-ten arrive through the tunnel.
- Australian visitors departing Britain by air pay £75 in Air Passenger Duty. Australians need no visa to visit Britain.
- Because of the distance, all direct flights from Australia to the UK have included a stopover to refuel, either in Singapore for British Airways, or Dubai for Qantas as they codeshared with Emirates, until September 2017 when they resumed operating their Australia-UK routes via Singapore.
- However, Qantas is preparing to launch the first direct, non-stop route between Australia and the UK, from Perth to Heathrow, starting in March 2018.
- At the moment though, British Airways and Qantas, the only airlines serving direct Australia-UK routes, only arrive at London Heathrow from Sydney for both, and from Melbourne for the latter only.
- Capacity on direct stopping flights is not entirely representative of the market's access to Britain in the case of Australia. As the Qantas-Emirates codeshare demonstrated, connecting routes are increasingly important for this market, especially as they offer more regional options in both countries. As direct flights also need to stop, Australians can easily substitute them by connecting routes through hubs in the Middle East or Asia.

81% of Australian visitors travel to the UK by plane.

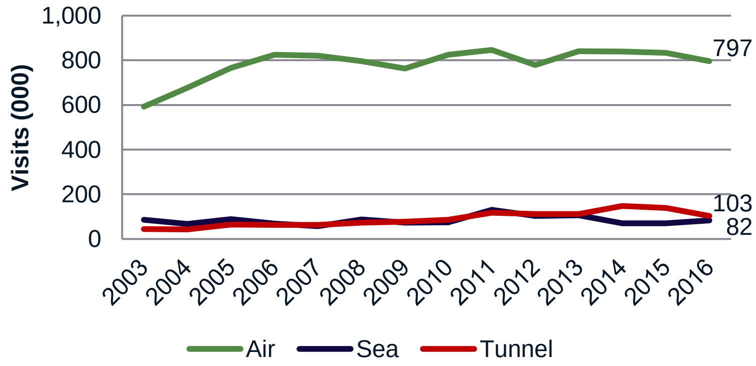
Access to Britain

Measure	2016
Weekly aircraft departures	21
Weekly aircraft seat capacity	8,848
Airports with direct routes in Australia	2
Airports with direct routes in Britain	1

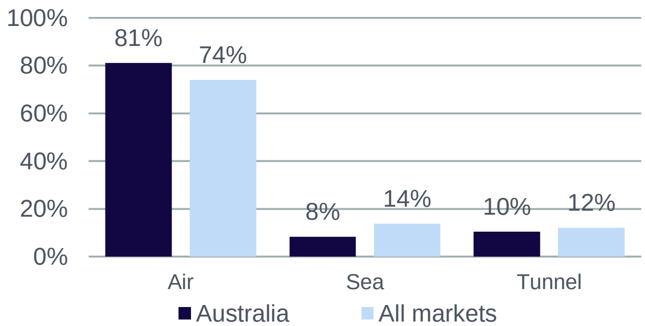
Source: International Passenger Survey by ONS, Apex RdC 2016 (stopping flights only), British Airways and Qantas websites.

3.1 Access: mode of transport

Visits by mode of transport

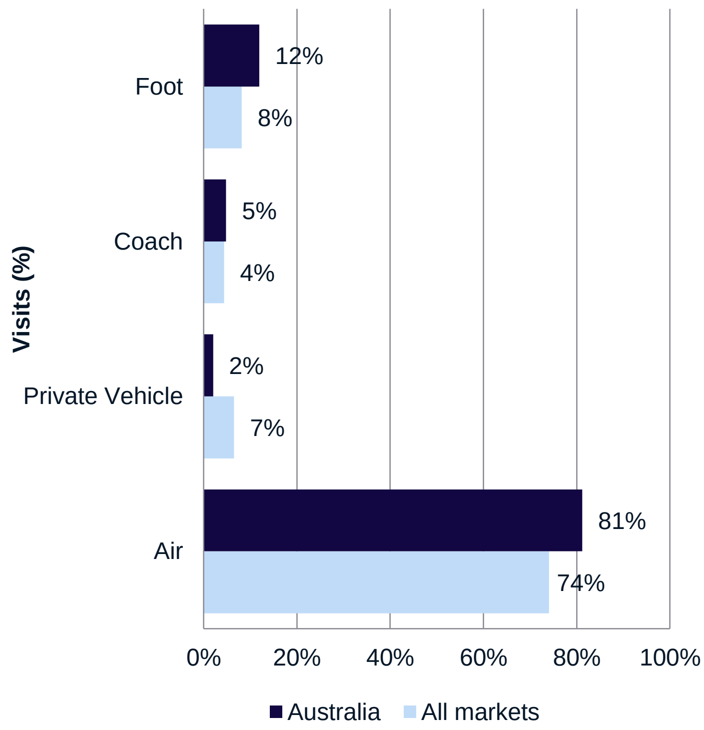


Annual share by mode (2016)



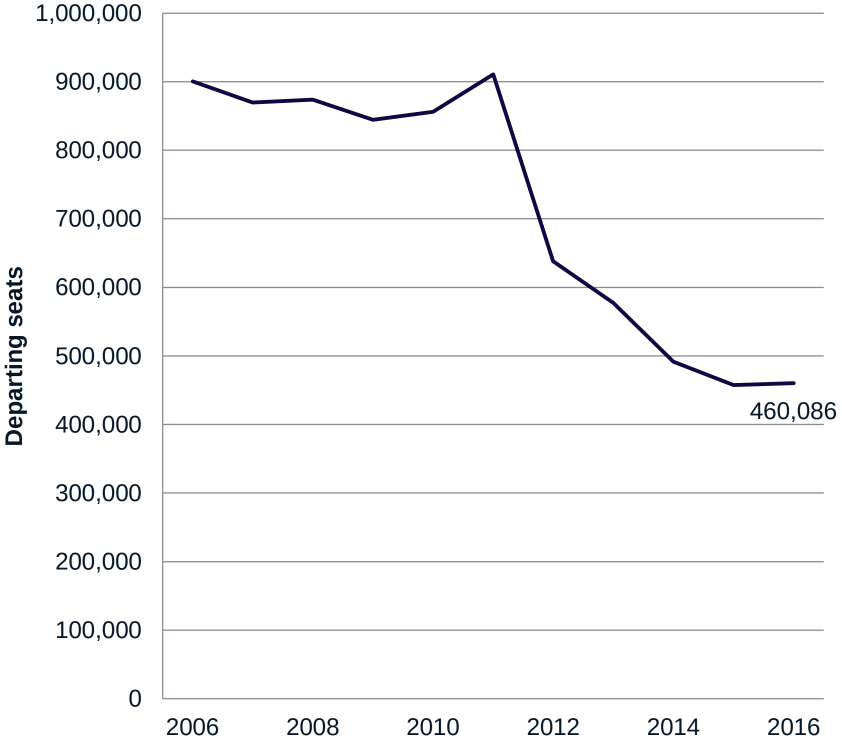
Source: International Passenger Survey by ONS

Arrivals in the UK by vehicle (2016)

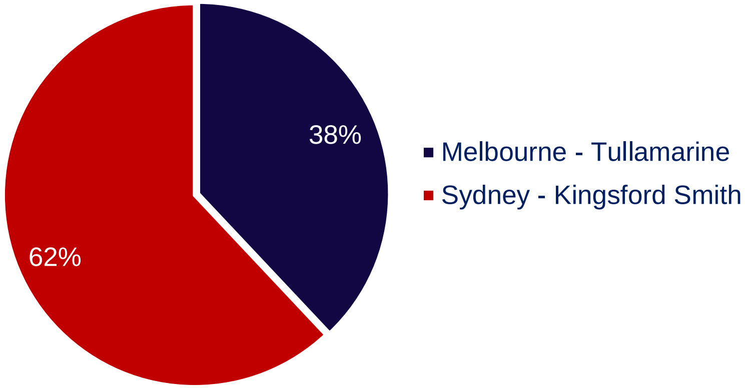


3.1 Access: capacity

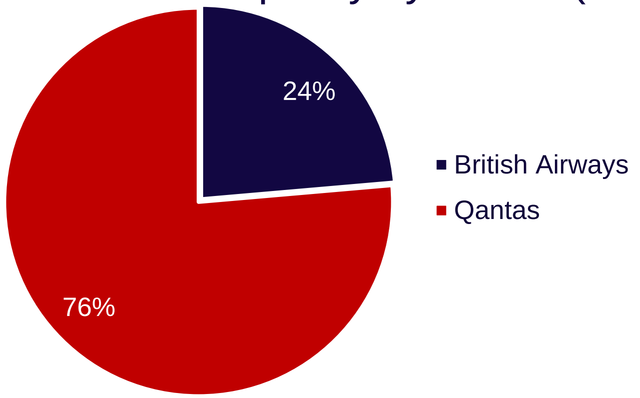
Annual airline seat capacity trends on direct, stopping flights*



Origin airport annual seat capacity (2016)



Airline seat capacity by carrier (2016)



Source: Apex Rdc 2016: includes direct, stopping flights that keep the same flight code

**Note that those flights are not repreentative of most access to Britain from Australia. There are about 20 airlines servicing connecting routes from Australia to the UK, also including China Eastern Airlines, China Southern Airlines, Malaysia Airlines and Thai, which all help the market reach about twice as many visits as seats available on direct routes per year.*

3.2 Travel trade: general overview

- The Australian travel trade landscape is quite concentrated: Flight Centre Travel Group and Helloworld Limited dominate the market. However, consortia of independent travel agencies have gained in importance in the last few years.
- If Australians are confident enough to book their holidays online, they will still mainly turn to OTAs to book domestic holidays or short-haul trips. As a consequence, vertically integrated travel companies are still relevant in the market for travel to the UK.
- Australians tend to book a long time in advance, mostly flexible packages, or semi-packaged holidays: travel agents have opportunities to sell them additional products during the period leading up to their trip.
- Most tour operators are based in Sydney and Melbourne; some others can also be found in Brisbane, Adelaide and Perth.

The Australian travel trade is mainly a concentrated landscape

3.2 Travel trade

Vertically-integrated main players		
	Wholesaler brands	**Retail brands**
Flight Centre Travel Limited	- Infinity Holidays - Explore Holidays	- Flight Centre - Escape Travel - Students Flights - Travel Associates - Cruiseabout
Helloworld Limited	- Qantas Holidays - Viva! Holidays - Travelscene - Rail Tickets - ReadyRooms.com - GO Holidays	- Helloworld - MTA Travel - Hunter Travel Group - My Travel Group

Main independent travel companies
Travel Corporation, including: Contiki, Trafalgar Tours, Insight Vacations, Busabout, Haggis, Evan Evans, Uniworld)
Tempo Holidays, owned by Cox and Kings
House of Travel Group, with brand TravelManagers in Aus

Main niche operators for Britain	
STA Travel	Excite Holidays
Globus & Cosmos	Driveaway Holidays
Holidays on Location	Scenic
Odyssey Travel	Australia Pacific Touring
Venture Holidays	Rail Plus

Main independent retail travel groups		
Magellan	Andrew Jones Travel	British Travel
Travel Counsellors	Phil Hoffman Travel	TravelManagers
Spencer Travel	Travel Concepts	Bicton Travel
Travel Directors	Travellers Choice	

Travel trade structure

- The trade structure in Australia is made up of travel agents, wholesalers, tour operators and GSAs (general sales agents). The larger part of market share for Britain is for independent (FIT) touring, with a mix and match approach. Different products are often bought separately and consumers are also inclined to purchase these through a variety of mediums with some elements from a travel agency, some online with intermediaries and some direct from the supplier.
- Whilst OTAs dominate domestic and short-haul travel purchases, these retailers have yet to develop their long-haul dynamic packaging product online, therefore vertically-integrated travel companies (with bricks and mortar retail agencies) continue to play an important role for the Australian consumer.
- Itineraries for holiday and leisure trips from Australia to the UK and Europe tend to be fairly complex in nature (across numerous countries, currencies and modes of transport) and the buying process associated with it tends to occur during a 3-18 month period. Wholesalers and retailers have good scope to effectively promote value-added products to potential travellers over this extended period of time in order to extend the regional value of their trip.

Australian travel agencies

- There are almost 3,800 agencies in Australia, the vast majority of which hold ATAS accreditation from the Australian Federation of Travel Agents. Most are either franchises of or wholly owned by the major chains Flight Centre Travel Group or Helloworld Limited. The remainder are either privately owned or belong to a travel agent collective, giving them membership deals and override commissions.
- The sector continues to concentrate. Many retail chains have a system of preferred suppliers whose products have priority in their agencies. They also take on products sold exclusively through their chain, though being sold by one chain may exclude a product from another. Agencies are highly computerised with almost 100% access to CRS systems.
- There has been good growth in the size and influence of independent travel consortia. Retails brands of this type include Magellan Travel Group, TravelManagers, Mobile Travel Agent, Travel Counsellors, Travel Directors, Travellers Choice and Travel Concepts.

3.2 Travel trade: practical information

General practical information:

- Commission levels for wholesalers, who generally will only sell to the agency community, tend to be a minimum of 15%; more likely 20 to 25%.
- Most tour wholesalers and tour operators tend to be based in Sydney and Melbourne; a few are located in Brisbane and Perth, mainly catering for the local market.

Planning and contracting cycle:

- Product contracting for the tour operators' 2019 brochures and sales periods will be conducted around May – August 2018 and the brochures will be designed and completed September – November 2018. The month of May onwards therefore is a critical time to meet with and present new commissionable product and destinations to wholesaler product managers.

Consumer and trade exhibitions:

- Flight Centre hold two main periods of travel expos, free for consumers to attend in all major cities:
  - World Travel & Cruise expos in Sept – Nov each year.
  - Travel Expos take place Feb – March each year.
- The Asia-Pacific Incentives and Meetings Expo (AIME) is the leading MICE event, held each February in Melbourne.
- The Travel Industry Exhibition and Conference is a trade-only event connecting travel buyers and suppliers, in July.

Where to find the trade

- The vast majority of the tour companies are located in either Sydney or Melbourne, with a scattering of players in Brisbane, Adelaide and Perth:

Sydney	
Helloworld Limited	Driveaway Holidays
The Travel Corporation	Excite Holidays
Globus & Cosmos	Scenic
Odyssey Travel	

Melbourne	
Tempo Holidays	STA Travel
Rail Plus	Holidays on Location
Sportsnet Holidays	APT
Travel Counsellors	Magellan Travel Group
Outdoor Travel	Sportsnet Holidays

Brisbane	
Flight Centre Travel Group	Back Roads Touring
Access UK Holidays	Albatross Travel Group

Adelaide	
Venture Holidays	Phil Hoffman Travel

Perth	
British Travel	Travel Directors

3.2 Travel trade: doing business

Practical information

- **Time difference:** For the working day, Australians will generally be a day ahead and therefore timely response to queries is always appreciated. During Australian Summer Time (November to April) Sydney is 11 hours ahead of the UK, and reverts back to 9 hours ahead during May – October. There are a number of different time zones, even half an hour in some cases, with a three-hour difference between Sydney and Perth.
- **Climate:** The seasons are the reverse to those in Britain, with summer being from December – March and June – August being the coldest months.
- **Business hours:** from 08:30-09:00 until 17:00-17:30 Mon - Fri.
- **Transport:** Air travel prevails between the major cities, whilst travel by train, coach or car is suitable otherwise. Australians drive on the same side of the road as in the UK, and traffic regulations are similar. Taxis and ride-sharing brands exist in most urban centres.

Meetings & business etiquette

- Work practises and etiquettes are very similar to those in Britain, and the travel trade are generally very welcoming to overseas product.
- Business is generally conducted in a relaxed but formal manner. Business suits are the norm even in summer.
- It is necessary to make appointments in advance. The destination, product and sales staff often look after more than one destination, so plan training options months in advance. The main European selling season starts in mid-October with the launch of the brochures and earlybird packages, until the end of March.
- The product managers in particular know their clientele and know what sells for them and will be very honest about the suitability of your product. They are also very loyal to existing suppliers, and long term relationships are very important.
- Email is the standard method of business communication in Australia, but a face-to-face visit will help cement the relationship.
- The Australian market is all about relationships, and keeping those relationships strong. Once back in the UK, prompt replies and immediate follow up will keep the relationship strong, as will providing rates in a timely manner. Whilst regular visits are unlikely, a yearly visit (or every other year) is very much valued to give exposure throughout the various arms of each company.

3.2 Travel trade: Australian holidays

National public holidays in 2018

(Variations may occur on a state by state basis)

Date in 2018	Date in 2019	National Holiday
1st January	1st January	New Year's Day
26th January	28th January	Australia Day
30th March – 2nd April	19th – 22nd April	Easter
25th April	25th April	Anzac Day
11th June	10th June	Queens Birthday (in all states but WA & QLD)
1st October	1st October	Labour Day
25th December	25th December	Christmas Day
26th December	26th December	Boxing Day

Source: www.publicholidaysaustralia.com.au

- Australians get four weeks of paid annual leave.
- There are 8 main public holidays per year but each state or territory is likely to have additional local public holidays.
- Term dates for primary and secondary schools also vary between state or territory, but generally there are 4 semesters of 10 week periods during a school-year:
  - Term 1 – late January to early April
  - Term 2 – late April to early July
  - Term 3 – mid July to late September
  - Term 4 – mid October to mid December
- Summer school holidays run from December to late January, and the majority of Australians take off the Christmas and New Year, with many companies either closing until mid-January, or running on skeleton staff. It is unlikely that you will be able to make an appointment in that time.

3.3 Caring for the consumer: understanding the society

Australian Culture

- While Australian society is founded upon British history and traditions, it has also been strongly influenced by immigration, and its multicultural mix is one of the more diverse in the world.
- The latest 2016 census revealed that a third of the Australian population was foreign-born. Recent immigration from China and India has increased since the last census in 2011, which adds to the cultural mix and is reflected in the dining and food culture.
- Australian culture is founded on stories of battlers, bushrangers, sporting heroes and brave soldiers. The value of a ‘fair go’ is important as is the concept of the great outdoors. In recent years there has been a growing recognition of indigenous heritage and culture.
- Education patterns are very similar to the UK. Most Australians seek university education after high school, but tend to live at home whilst studying.
- Most Australians like sports. Sports events between Australia and the British nations can raise interest in visiting Britain.

Source: Australian Bureau of Statistics

- As a whole, Australians are looking for ways to improve their work/life balance and this key driver influences many aspects of their day-to-day lives, as it relates to family and social networking, hobbies and other leisure pursuits. Community involvement and holidays is key to this ‘personal growth’.
- As most Australians live within 50 kilometres of the coast, the beach is an integral part of their recreational lifestyle.
- There is still a desire for Australians to own their family home. Housing availability of course varies between each State capital, but the housing market in and around the main cities has seen an increase in price in recent years that makes access to property more difficult for millennials. Young Australians tend to increasingly prioritise other types of expenses, especially for leisure pursuits, including travel.
- Australians still tend to look to retire around the age of 65, although there is increasing pressure to work beyond that age to ensure a suitable retirement fund. Seniors tend to be very active in Australia and look at outbound travel as a key part of continuing to “grow” after their working life.

3.3 Caring for the consumer

Language

- English is the official language of Australia.

Interaction

- Australians place a high value on relationships.
- They value sincerity and authenticity. Honesty is appreciated and expected.
- Australians are known to be very direct and to the point. They also usually have a good sense of humour.
- A holiday to Britain is planned well in advance, and many Australians will pick up a hire car or hop on a train and explore. They tend not to like to cram in too many pre-booked activities but to explore for themselves and discover beautiful places and lesser known areas. They will welcome suggestions to help them discovering such sites.
- Meeting the locals is a key part of the holiday. Australians love to chat with the locals and find out about the history of the area, recommended pubs and markets and find out about local stories.

Top Tips

- Most Australian visitors arrive by plane very early in the morning, and appreciate being able to check-in to their room. If that is not possible, they would appreciate somewhere to shower or clean up. As Britain is usually a long trip, they will generally have a large suitcase with them, and will need some space to store it in their room.
- Remember that visitors may not have slept for 24 hours (or more) and will likely be tired on arrival. If planning an itinerary for Australians, do not make it too intensive for the first few days.
- Generally, Australians do not tip unless service has been exceptional.
- Australians are used to travelling long distances, and accept the inconvenience associated with long haul flights. You need to travel five hours from the East coast to the West coast, just to leave the country. Travel is part of the culture, especially for the youth market who feel the need to head abroad to get some experience of other cultures.

3.3 Caring for the consumer: hospitality

Accommodation

- All types of accommodation appeal to the Australian market. In Britain, staying with friends and relatives is important. However when staying at paying accommodation, since they stay longer than average visitors, they will often choose a mix of B&B, hotels and even hostels as they might want to lower the cost of their stay by saving on accommodation.
- Self-catering accommodation are also appreciated and non-hotel accommodations are usually perceived as less expensive options.
- The quality of facilities in Australian motels is high. Tea/coffee making facilities in the room, together with an iron and ironing board will be expected.
- A recent HotelsCombined study showed that Australian travellers value larger rooms with an outdoor access (balcony, terrace for example), and free technology, especially complimentary, fast Wi-Fi.

Food and drink

- In recent years, Australia has tried to rise the profile of Its food and drink offering at some of its own domestic destinations.
  Thus food and drink can be important elements of their holidays abroad, even though only 24% of Australians who have not visited Britain before would pick 'Sampling the local food and drink' as a motivator to visit Britain.
- In 2017, VisitBritain and DEFRA commissioned a study about international travellers' perceptions of British food and drink. Australian respondents were more likely to agree that Britain offers attractive food and drink options for tourists, above the all-market average (35% vs 29%).
- They will most likely associate Britain with baked goods, but would also be tempted to try the British cheeses.
- Overall they are more interested in trying iconic British foods than average, especially a traditional roast dinner, fish and chips, or a full English breakfast.
- Australians tend to eat their evening meal after 7pm. Most will eat breakfast at their accommodation, and eat one meal, either lunch or dinner, in a restaurant. They may often pick up a snack/sandwich from the market or take-away for the other meal.

Source: HotelsCombined, TravelTalk, Agoda's Travel & Tech Study 2017, kubi kalloo/VB research, VisitBritain/IPSOS 2016, VB/DEFRA's "Food is GREAT" research, Anholt-GfK NBI 2015

3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you.

To find out more browse our opportunity search (visitbritain.org/opportunities)

or trade website (trade.visitbritain.com)

or contact the B2B events team (Email: events@visitbritain.org)

or campaign partnerships team (Email: partnerships@visitbritain.org)

or trade support team (Email: tradesupport@visitbritain.org)

3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data visitbritain.org/latest-quarterly-data-uk-overall visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market visitbritain.org/inbound-tourism-trends
- Sector-specific research visitbritain.org/sector-specifc-research
- 2017 Inbound Tourism Forecast visitbritain.org/forecast
- Britain‘s competitiveness visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about the Australian or other inbound markets browse

our markets & segments pages or (visitbritain.org/markets-segments)

our inbound research & insights or (visitbritain.org/inbound-research-insights)

contact us directly (Email: research@visitbritain.org)

3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain https://www.visitbritain.org/understanding-international-visitors
- Technology and social media https://www.visitbritain.org/understanding-international-visitors
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more visitbritain.org/visitor-characteristics-and-behaviour

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contact us directly
(Email: research@visitbritain.org)

Market and Trade Profile: Australia