

CONFIDENTIAL

# 2023 GLOBAL TRAVELLER RESEARCH PROGRAM

## SYNDICATED REPORT

### AUSTRALIA MARKET OVERVIEW

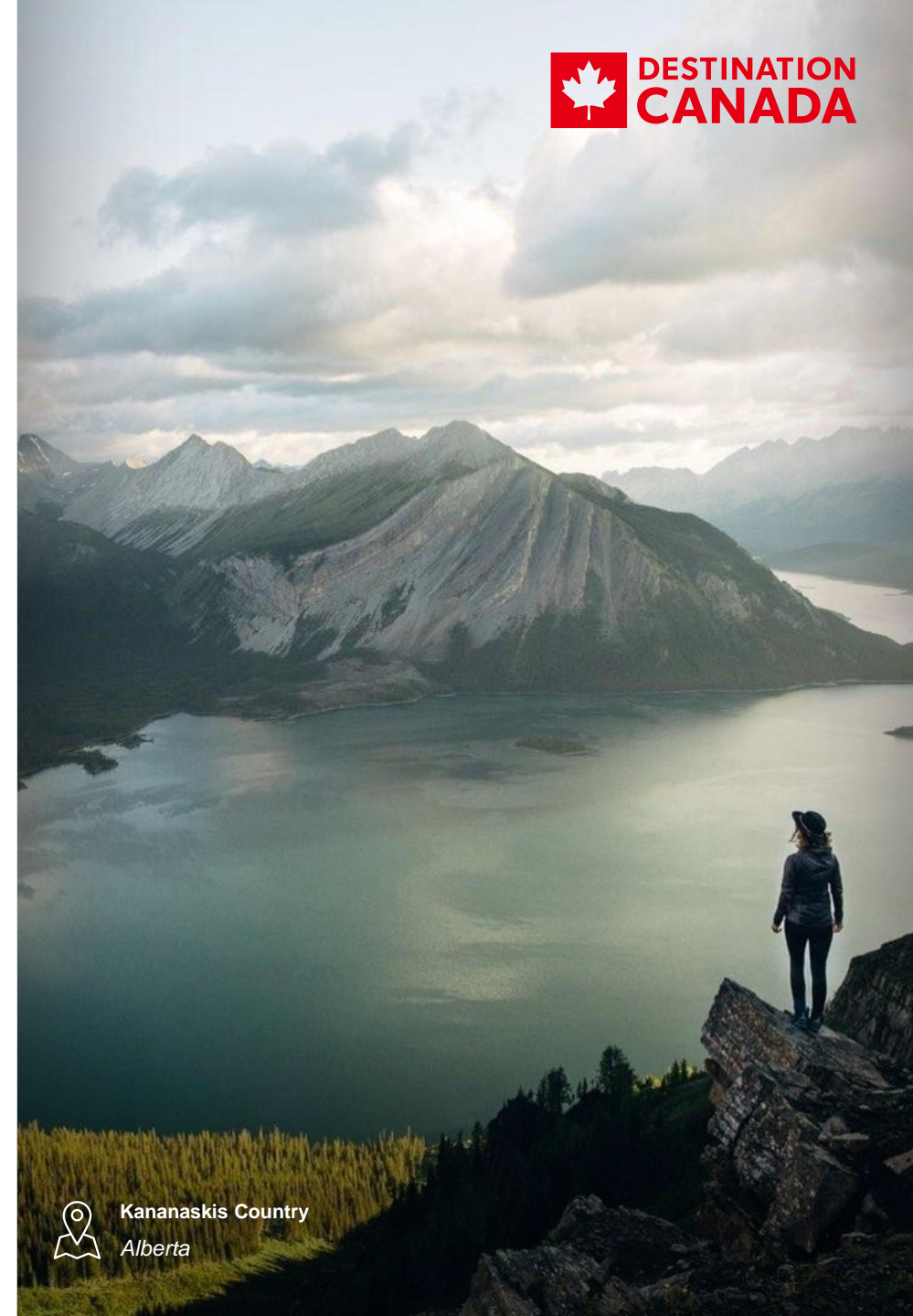


CANADIAN TOURISM DATA  
**collective**

# Australia Market Overview

*An annual view of the Australian market to help understand general trends towards travel and how Canada fares against competitors on key destination brand metrics.*

Please note that the insights in this report are drawn from two of YouGov's proprietary syndicated data products, **YouGov Global Travel Profiles** and **YouGov DestinationIndex**. As a result, access to and sharing of this report and its underlying data are restricted to those within Destination Canada's organization and among organizations with access to the Canadian Tourism Data Collective (CTDC).



Kananaskis Country  
Alberta




## YouGov® Global Travel Profiles

YouGov Global Travel Profiles (GTP) surveys consumers daily in 30 key travel origin markets, to help travel & tourism organizations identify who is ready to travel when, where they want to go and what kind of trip they are planning.




**Survey Start in Australia**

October 20, 2020



**Methodology Notes**

Attitudinal statements are integrated into YouGov Global Travel Profiles platform from another YouGov study. These questions have lower sample sizes than other variables.



**2023 Base Sizes**

Sample distribution: **National 18+**

Total Australia: **16,351**


## YouGov<sup>®</sup> DestinationIndex

**YouGov DestinationIndex** is an always-on destination brand tracker. Daily data enables you to spot sentiment changes in real-time and take action, while measuring and benchmarking performance. Track public perception of Canada and other destinations across 16 brand metrics to track destination brand health, inform strategy, and ultimately influence travellers' perception of Canada.




**Survey Start in Australia**

February 28, 2020



**Methodology Notes**

Maximum of 30 destinations shown to any panel member at any given time, with sample split accordingly as more than 30 destinations are tracked. Destinations are added to the tracker on an on-going basis.



**2023 Base Sizes**

Sample distribution: **National 18+**

Total Australia: **7,538 - 8,790**



# Syndicated Product Overview



## YouGov® Destination Index

### 16 key metrics

#### Engagement: Media & communication metrics

##### Advertising Awareness

- 1 Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?

##### Aided Awareness

- 2 Which of the following destinations have you ever heard of? Please select all that apply.

##### Attention

- 3 Respondents hearing positive OR negative buzz about the destination.

##### Buzz

- 4 Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)? Now which of the following have you heard something NEGATIVE about over the PAST TWO WEEKS?

##### Word of Mouth Exposure

- 5 Which of the following destinations have you talked about with friends or family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

#### Lower funnel metrics

##### Purchase Intent

- 6 Which of the proposed destinations are you most likely to visit?

##### Consideration

- 7 When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?

##### Recent Visitor (Current Customer)

- 8 Which of the following destinations have you visited in the past 12 months?

##### Former Visitor (Former Customer)

- 9 Which of the following destinations have you ever visited?

#### Destination / Brand health metrics

##### General Impression

- 10 Overall, of which of the following destinations do you have a POSITIVE impression? Now which of the following destinations do you have an overall NEGATIVE impression?

##### Visitor Satisfaction

- 11 Of which of the following destinations would you say that you are a "SATISFIED VISITOR"? Of which of the following destinations would you say that you are a "DISSATISFIED VISITOR"?

##### Quality

- 12 Which of the following destinations do you think have a GOOD QUALITY? Now which of the following destinations represents POOR QUALITY?

##### Value

- 13 Which of the following destinations do you think represents GOOD VALUE FOR MONEY? By that we don't mean 'cheap,' but that the destinations offer a visitor a lot in return for the price paid. Now which of the following destinations do you think represents POOR VALUE FOR MONEY? By that, we don't mean 'expensive,' but that the destinations do not offer a visitor much in return for the price paid.

##### Reputation

- 14 Which of the following destinations do you regard as having a GOOD reputation for vacations? Now which of the following destinations do you regard as having a POOR reputation for vacations?

##### Recommendation

- 15 Which of the following destinations would you RECOMMEND to a friend or colleague? And which of the following destinations would you tell a friend or colleague to AVOID?

##### Index (Overall Destination Health)

- 16 Average of Impression, Quality, Value, Reputation, Satisfaction & Recommend



## While international travel is surging, cost is increasingly becoming a travel obstacle

- Incidence of planned international vacations has almost doubled since 2021
- Mentions of price of travel and accommodation as travel obstacles continue to increase
- 39% mention overall value for money as a factor effecting destination choice, highest of all factors



- *To help address cost concerns, Canada can showcase its value propositions in its marketing efforts, spotlighting the unique experiences Canada can offer*



## Destinations that can provide a variety of experiences are preferred

- Most Australians prioritize cultural and learning experiences in their travels
- Combined relax-and-sightsee vacations and beach (relaxing) vacations are mentioned by one third of Australians as their favourite type of vacation



- *Emphasizing Canada's vibrant cities, cultural diversity, wide-open landscapes and the potential for multifaceted experiences could align with the preferences of Australian travellers*



## Australia is already a highly competitive market, and the US is increasingly expanding its presence

- Canada, Japan, Italy and the UK score within a few percentage points on many key performance metrics and continue to lead the competitive set
- Ad awareness of both Japan and the US increased year-over-year
- Buzz and word of mouth for Japan increased year-over-year
- Recommendations, overall destination health and buzz for the US increased year-over-year



- *The intensifying competition underscores the need for Canada to generate buzz and stay top-of-mind among Australians*



## Independent planning is prevalent among Australian travellers

- 70% organize their vacations themselves and many already have a destination in mind when vacation planning
- Travel agencies, travel discounters or tour operators are rarely used when booking accommodation
- 46% use online search and 42% use information from friends and family when vacation planning
- Social media, broadcast TV and travel websites are top advertising channels




- *Independent planning highlights the need to align with Australians' preferred advertising channels. Leveraging SEO, user-generated content, and influencers could help keep Canada in the conversation*



# Australia Market Overview



 Peggy's Cove  
Nova Scotia



# Attitudes Towards Travel



**Most Australians prioritize cultural and learning experiences in their travels and will often already have a destination in mind for their next vacation. Despite enthusiasm to spend more while travelling, Australians also consider cost-saving measures like budgeting and booking outside of school holidays**

■ Definitely disagree   ■ Tend to disagree   ■ Neither agree nor disagree   ■ Tend to agree   ■ Definitely agree

Definitely / Tend to agree (Top 2 box)

Statement	Definitely disagree	Tend to disagree	Neither agree nor disagree	Tend to agree	Definitely agree	Definitely / Tend to agree (Top 2 box)
You can only ever get to know a country by experiencing its culture	1%	4%	19%	54%	23%	77%
When I'm planning my next vacation I have at least one destination in mind or already selected	3%	8%	21%	47%	21%	68% ▲
I like to come back from vacation having learned something new	1%	4%	27%	47%	20%	68%
I enjoy researching and coming up with a plan for my vacations	6%	11%	27%	39%	17%	56%
I am passionate about travelling	6%	12%	27%	34%	21%	55%
I tend to book my short breaks (i.e., up to 3 days) outside of school holidays/breaks	6%	8%	31%	31%	24%	55%
I like my vacation to have some form of physical activity	3%	11%	31%	41%	14%	55%
I am excited to generally spend more when travelling	4%	12%	30%	39%	14%	53%
I tend to book my vacations (i.e., more than 3 days) outside of school holidays/breaks	7%	9%	31%	29%	24%	53%
I try to keep to a strict budget when I go on vacation	3%	17%	29%	38%	13%	50%
I like to take vacation in the country I live in rather than abroad	7%	16%	33%	28%	16%	44%
When I go on vacation, I like to go off the beaten track	5%	19%	36%	30%	10%	41% ▼
When I go on vacation I only want to eat, drink and lie in the sun	10%	25%	25%	28%	12%	41%
I usually go back to the same places on vacation	6%	24%	35%	28%	7%	35% ▼
I would never think of taking a package holiday/vacation	11%	28%	31%	19%	11%	30%
I like to go on vacation where activities are organized for me	16%	26%	30%	21%	7%	28%
I usually wait for last minute deals rather than planning my vacation or short break in advance	13%	27%	35%	17%	8%	24%
I try to shop Duty Free at airports/train stations rather than at the main stores for a better deal	20%	25%	34%	15%	7%	22%



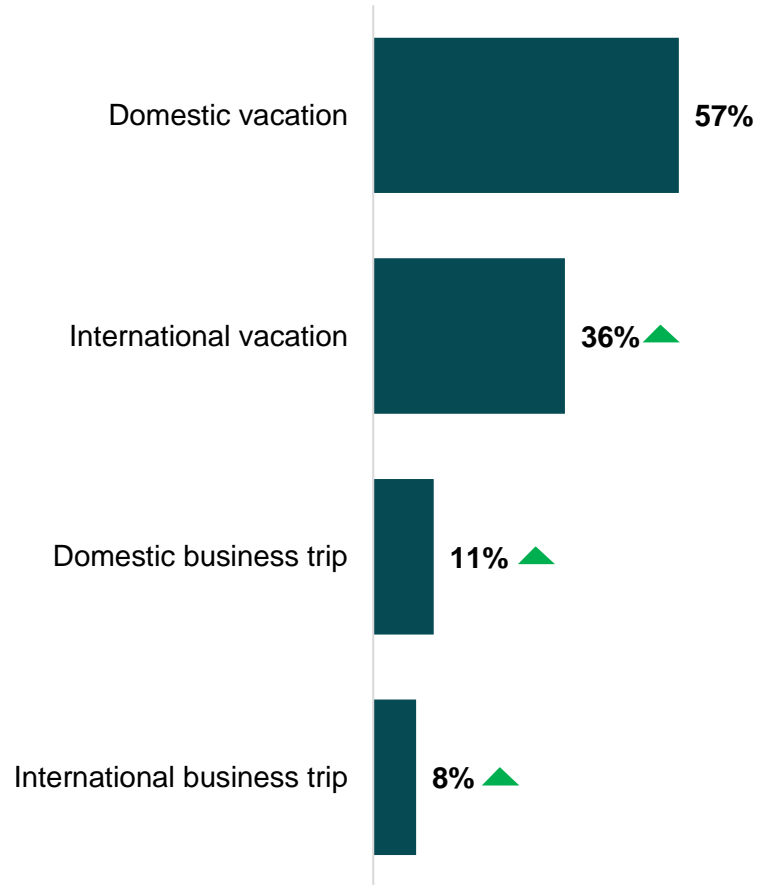


# Trip Types Planned in Next 12 Months

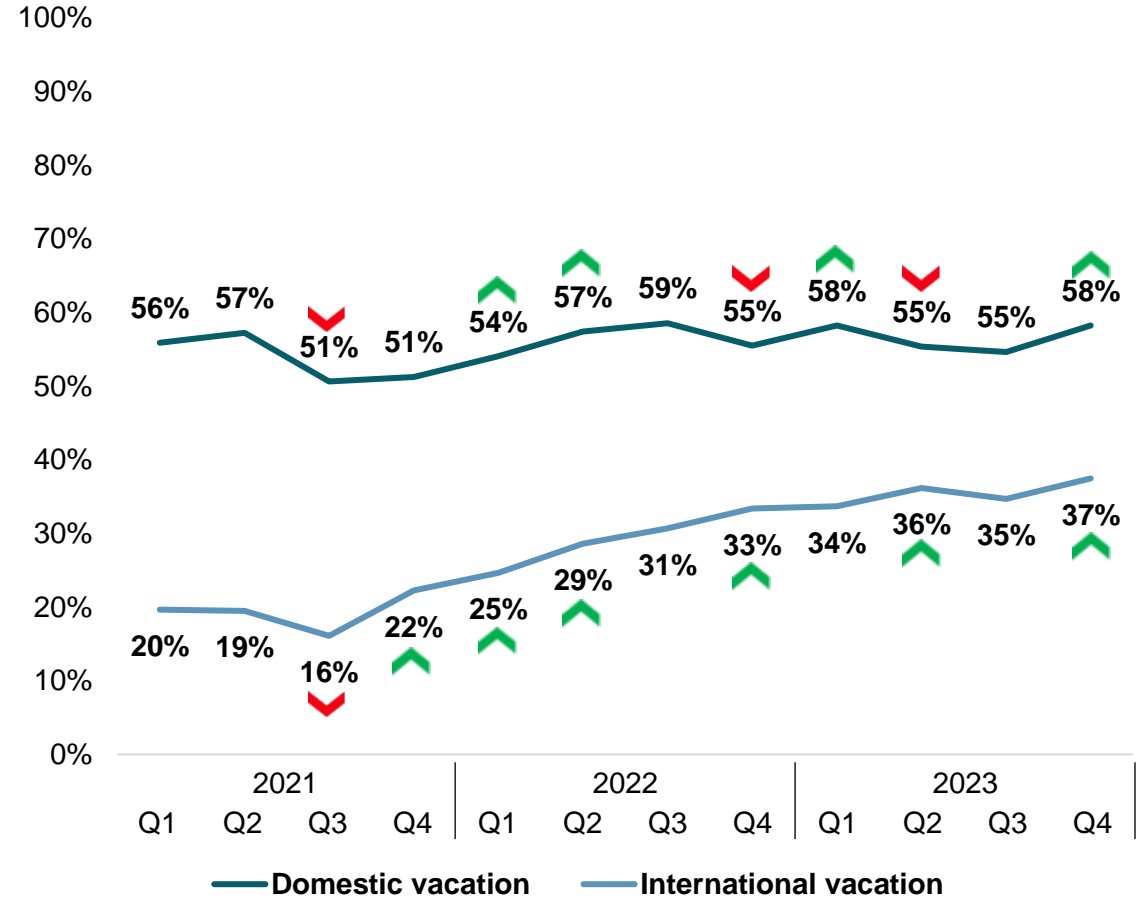


*Incidence of planned international vacations has surged over the last two years, almost doubling compared to 2021 scores. Domestic vacations are still preferred by Australians, but has not seen the same growth as international vacations*

## Trip Types Planned in Next 12 Months



## Vacation Trips Planned in Next 12 Months (Trended)



9 2023 Base: Australians 18+ (n=16,351)  
 2021-2023 Quarterly Trending Base Range: Australians 18+ (n=3,455-4,175)  
 Q: Which, if any, of the following trips are you planning to take in the next 12 months?  
 Please select all that apply.

▲ / ▼ = significantly higher/lower result (vs. 2022) | ▲ / ▼ = significantly higher/lower result (vs. previous quarter)

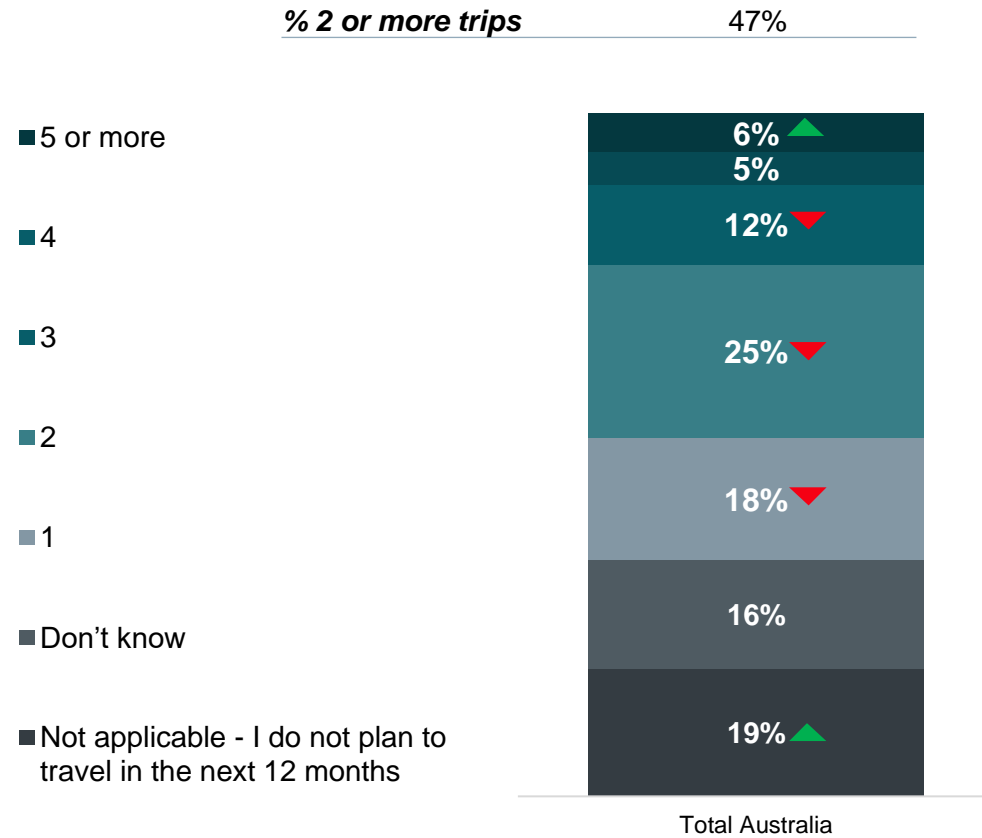


# Number of Trips Planned in Next 12 Months

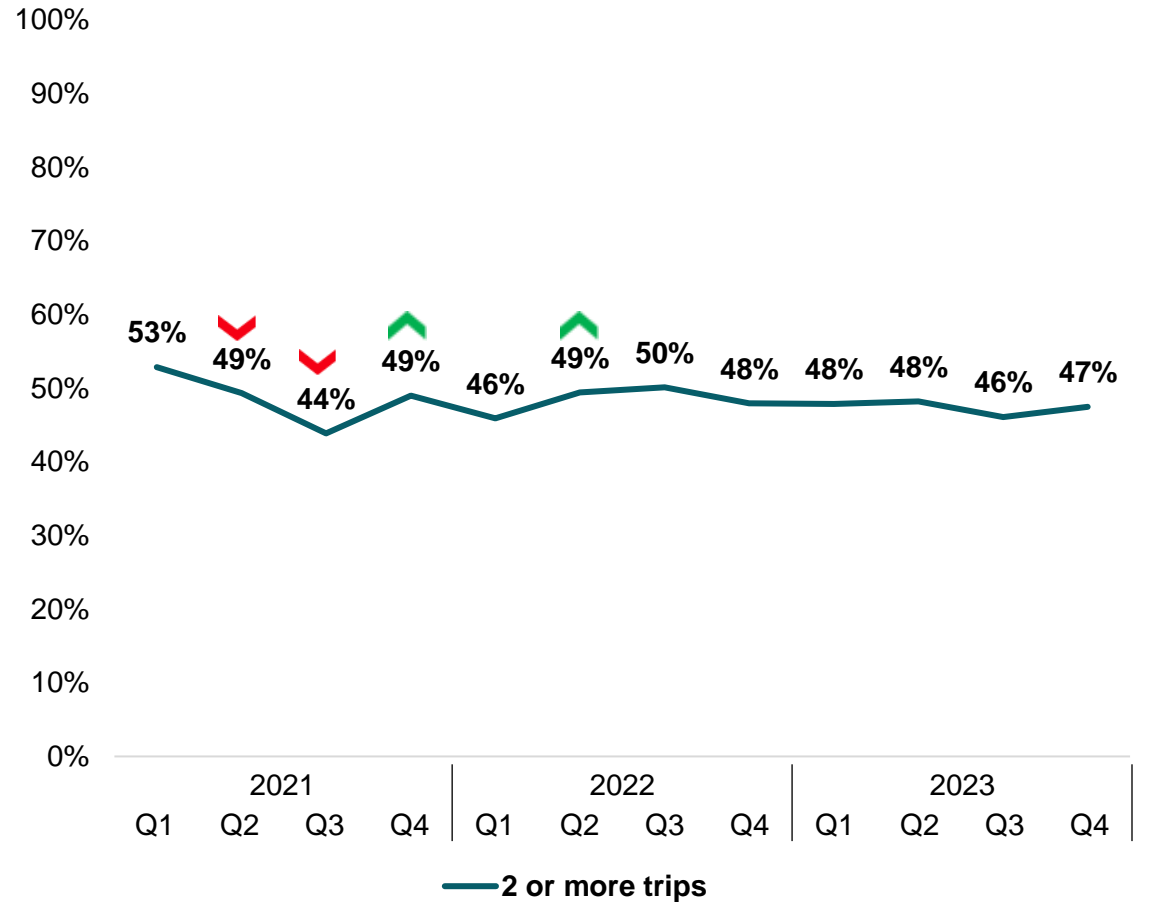


Australians are planning a similar number of trips as in years past, with roughly half of Australians planning two or more trips in the next year

## Number of Trips Planned



## Number of Trips Planned (Trended)

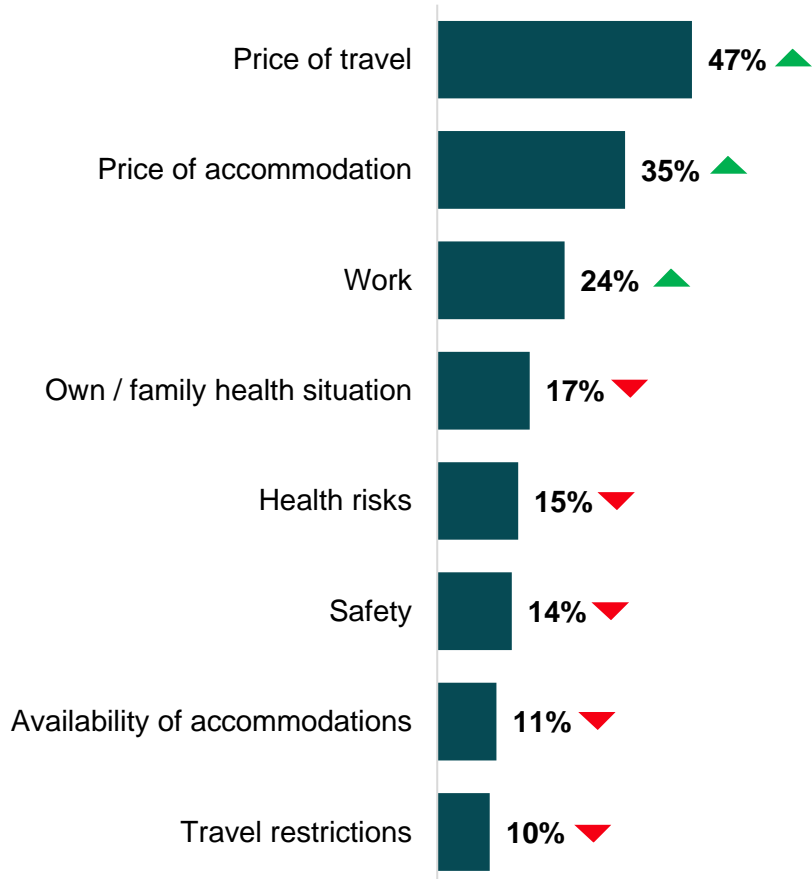


# Factors Preventing Travel

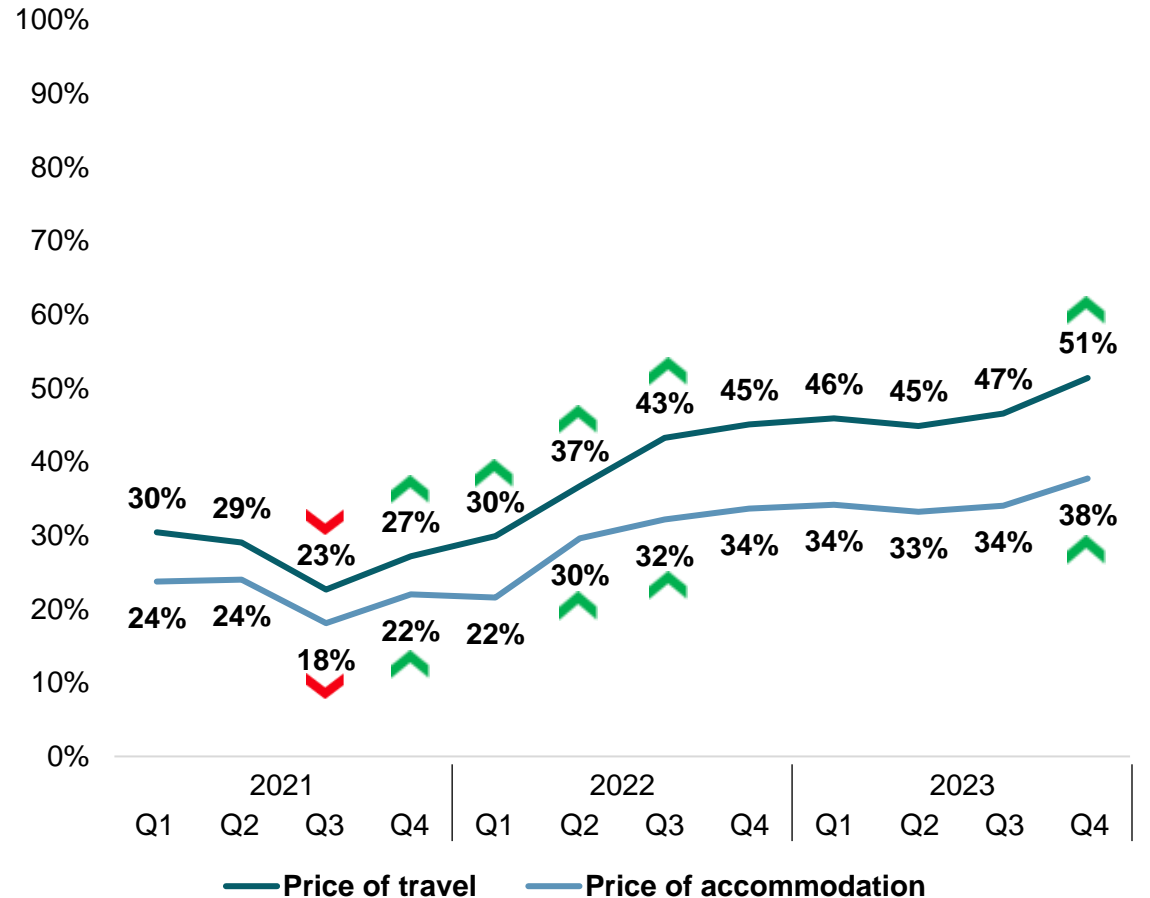


With Australians planning more international trips, price of travel and accommodation have increasingly become travel obstacles; half of Australians mentioned price of travel as a travel obstacle in 2023 Q4

## Factors Preventing Travel



## Select Factors Preventing Travel (Trended)

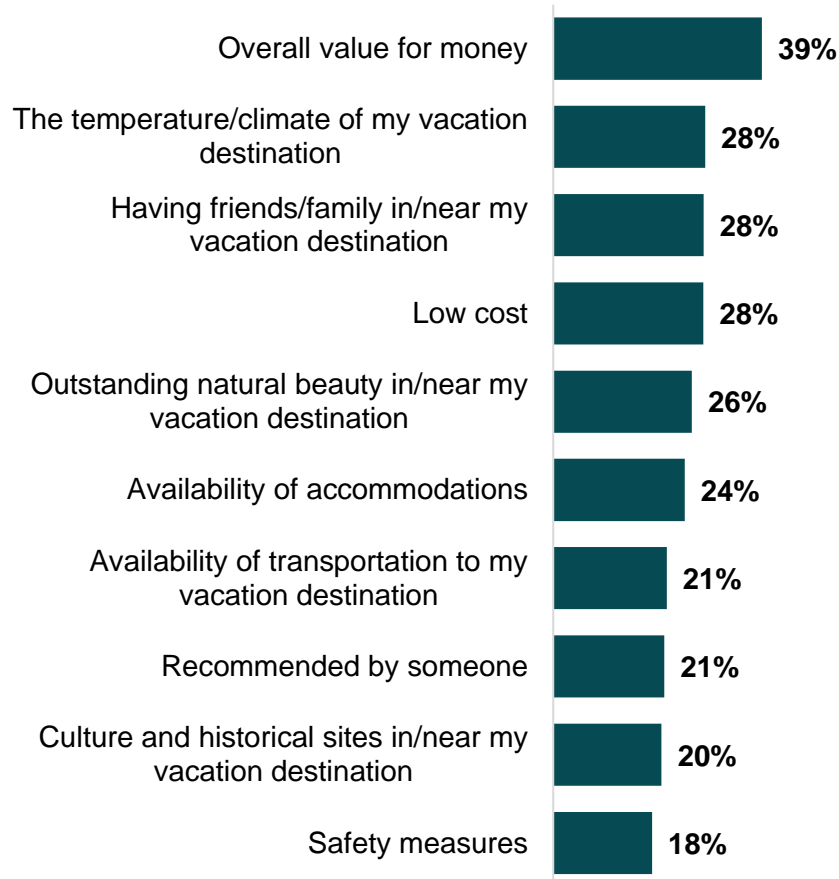


# Destination Choice Influences

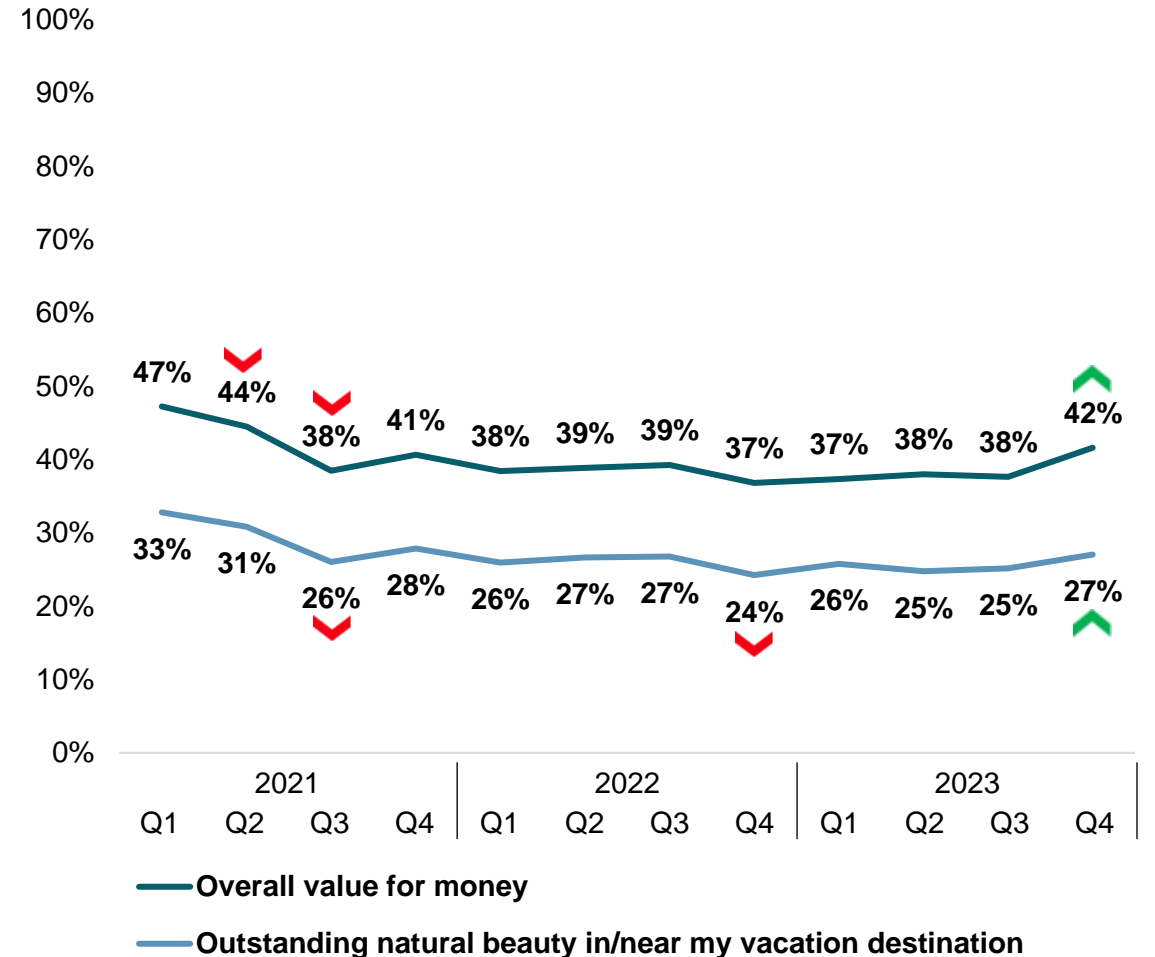


Overall value for money ranks as the top factor affecting destination choice, mentioned by two in five Australians; natural beauty ranks fifth behind temperature, friends/family at the destination and low cost

## Destination Choice Influences (Top Responses)



## Select Destination Choice Influences (Trended)





# Favourite Types of Vacations

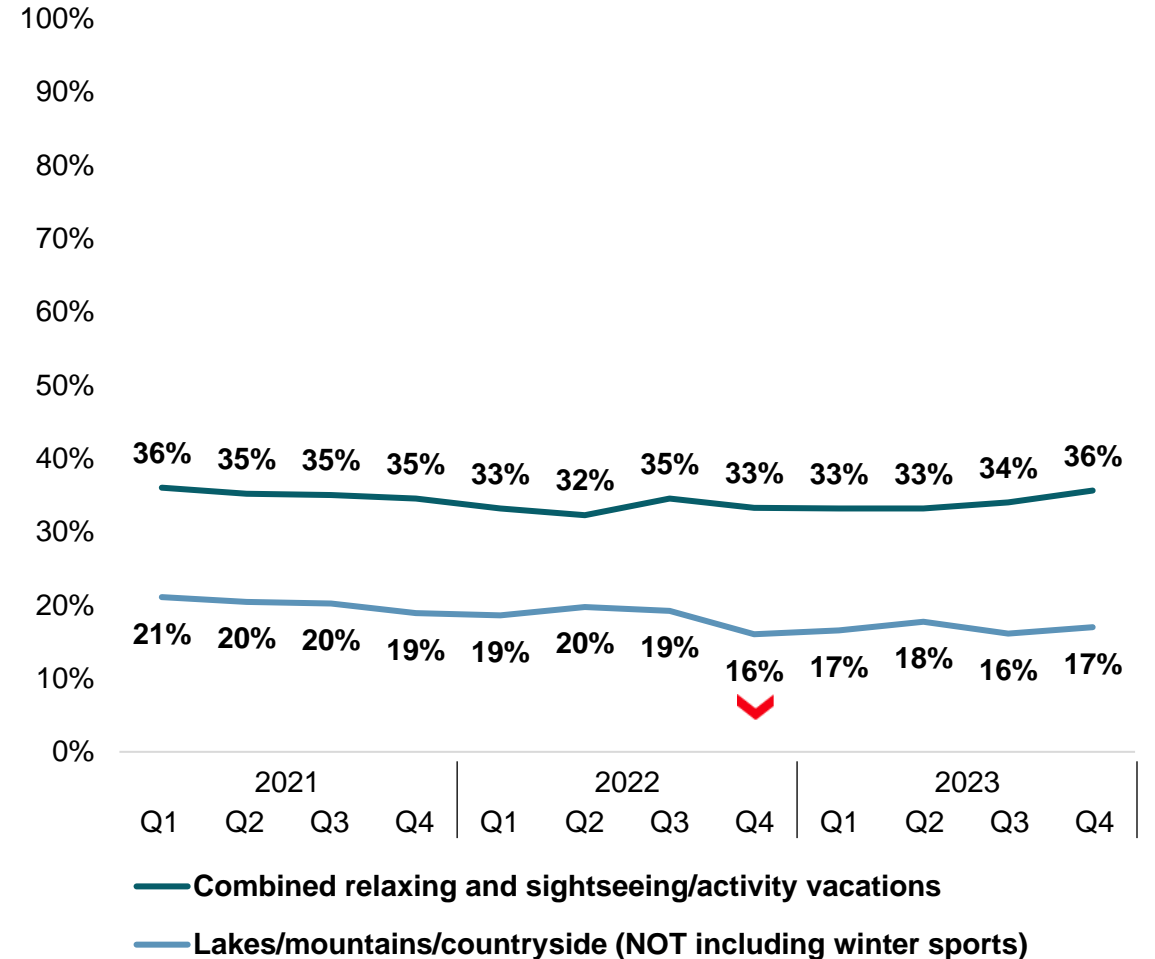


Visits to friends and family is the favourite vacation type of Australians, a reflection of their preference towards domestic vacations. Combined relax-and-sightsee vacations and beach (relaxing) vacations are mentioned by one third of Australians. Mentions of nature-focused vacations have been trending down, now tied with multi-centred and activity-focused vacations

## Favourite Types of Vacations (Top Responses)



## Select Favourite Types of Vacations (Trended)



2023 Base: Australians 18+ (n=16,351)  
 2021-2023 Quarterly Trending Base Range: Australians 18+ (n=3,498-3,667)  
 Q: Thinking more generally about the vacations that you go on, not just those that you have taken in the last 12 months, which, if any, of the following types of vacations do you typically take? Please select all that apply.



# Vacation Planning Methods

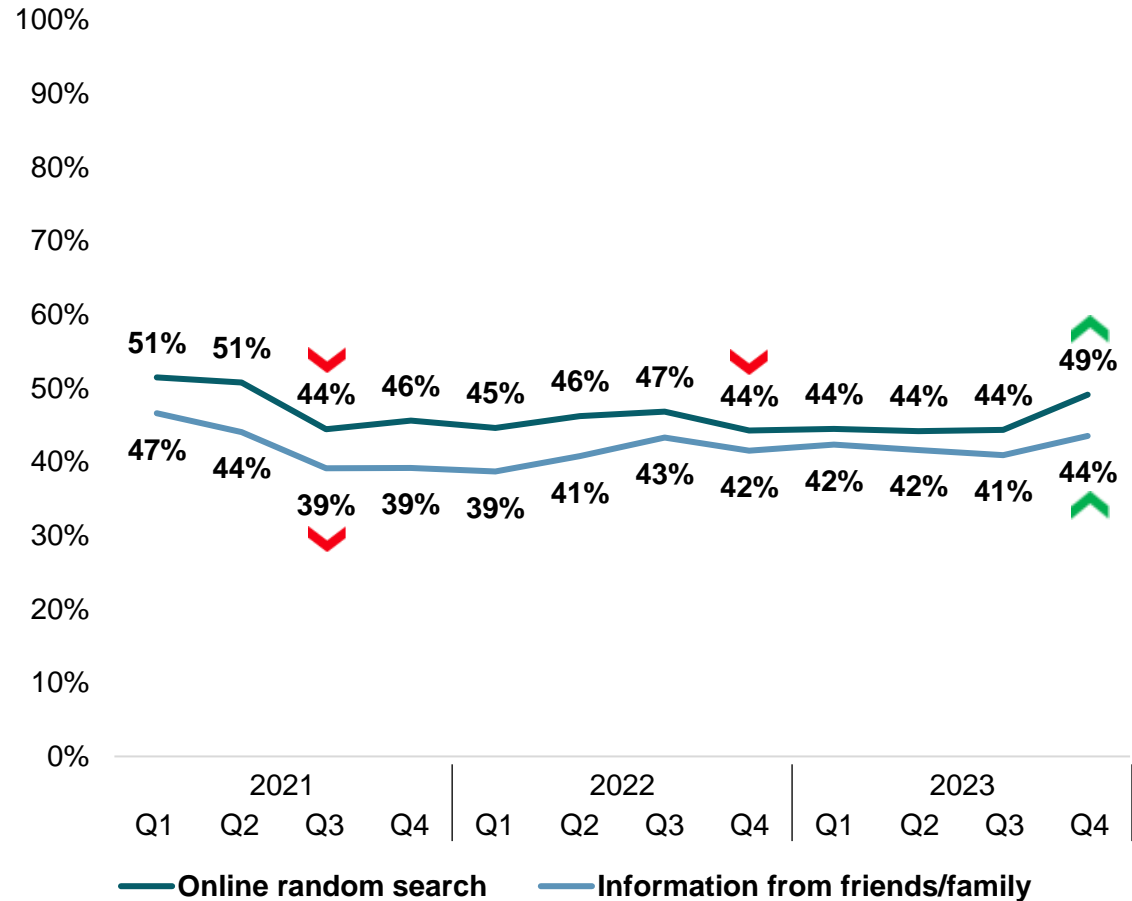


Online random search and information from friends/family are the most used resources for planning vacations, used by over two in five Australians

## Vacation Planning Methods



## Select Vacation Planning Methods (Trended)

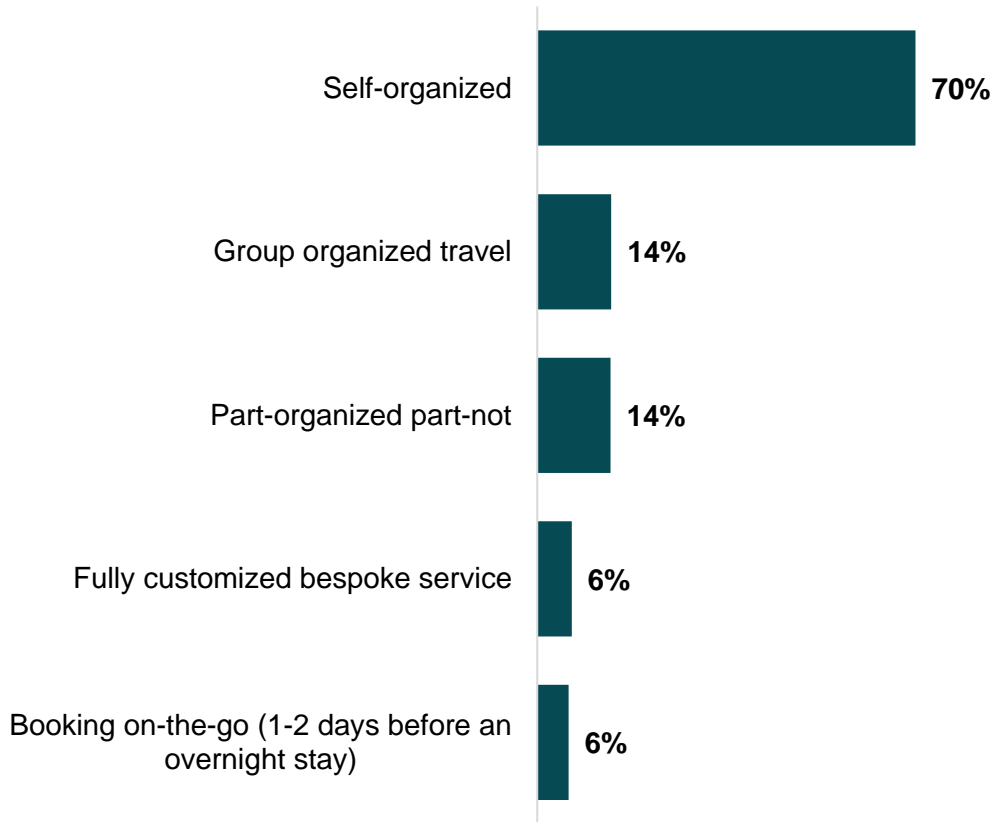


# Vacation Organization Habits

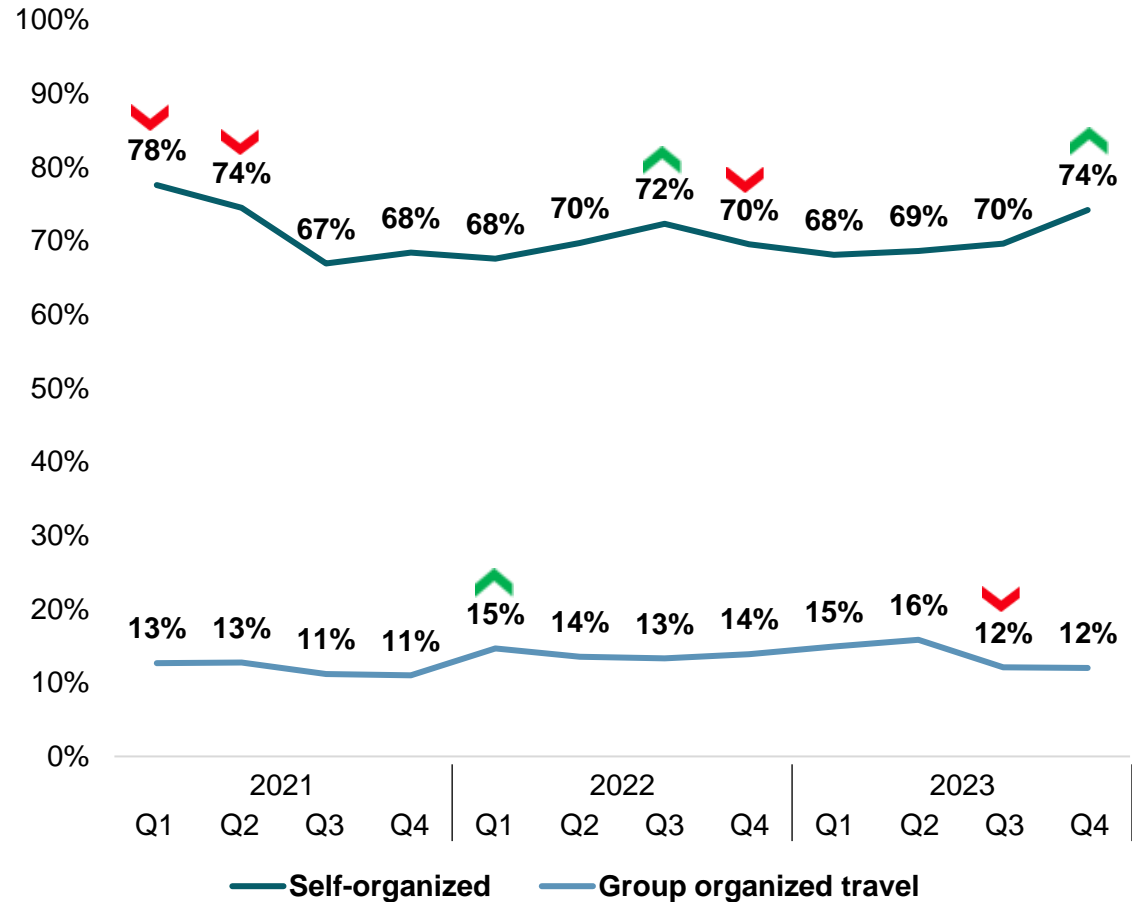


Australians predominantly organize vacations themselves as opposed to relying on others or third-parties

## Vacation Organization Habits



## Select Vacation Organization Habits (Trended)

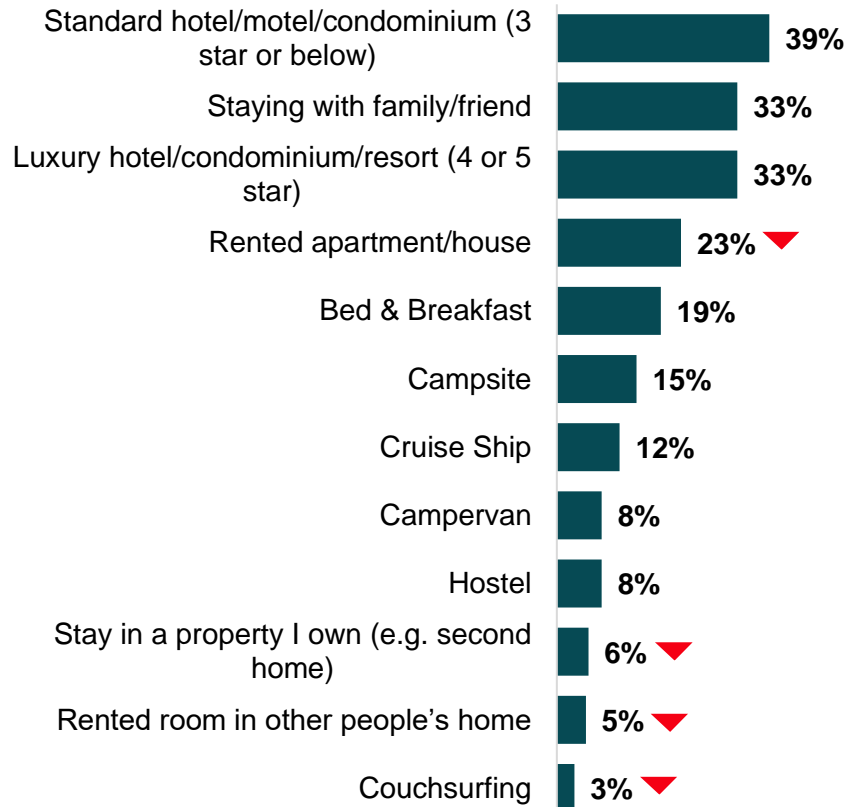


# Accommodation Type Typically Stayed At

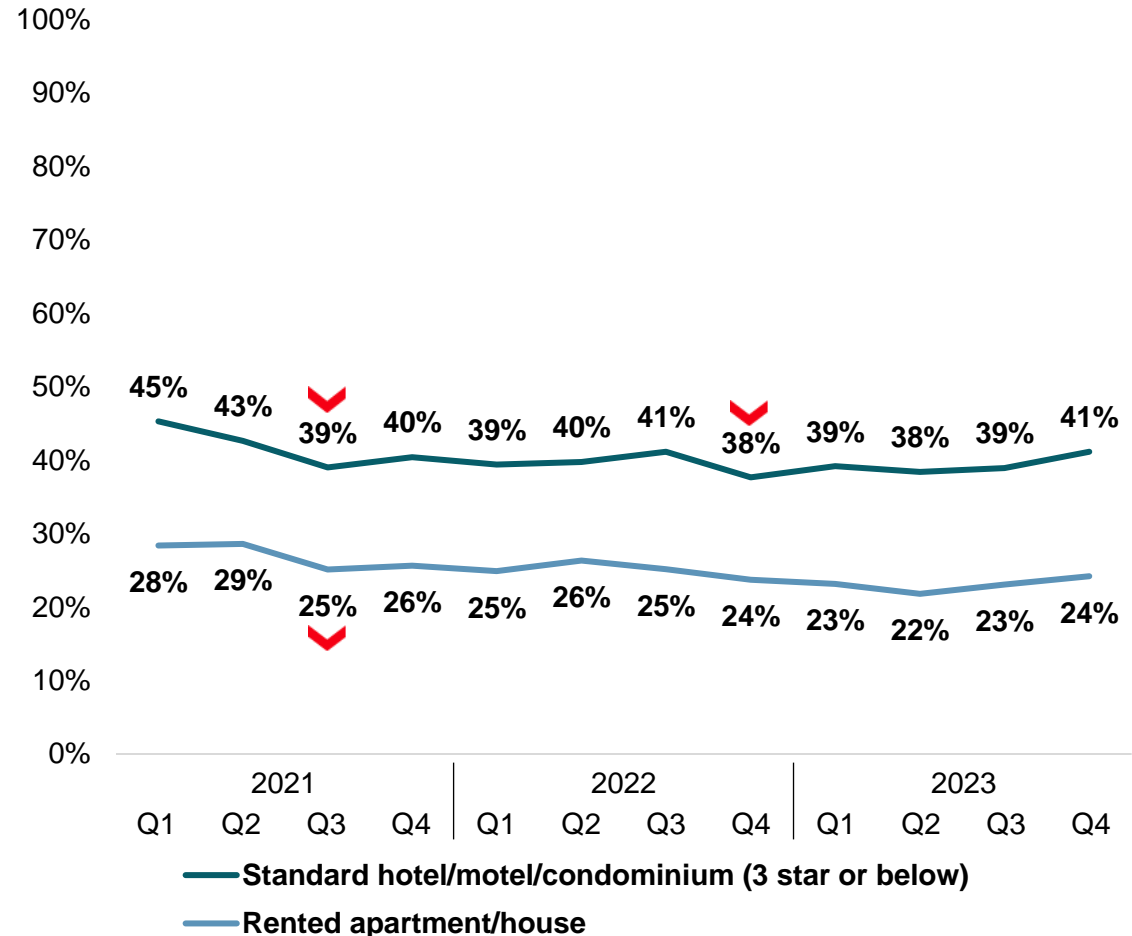


Hotels and staying with family/friends are the most common types of vacation accommodations for Australians. Use of rentals has been in decline since 2021

## Accommodation Type Typically Stayed At



## Select Accommodation Types (Trended)



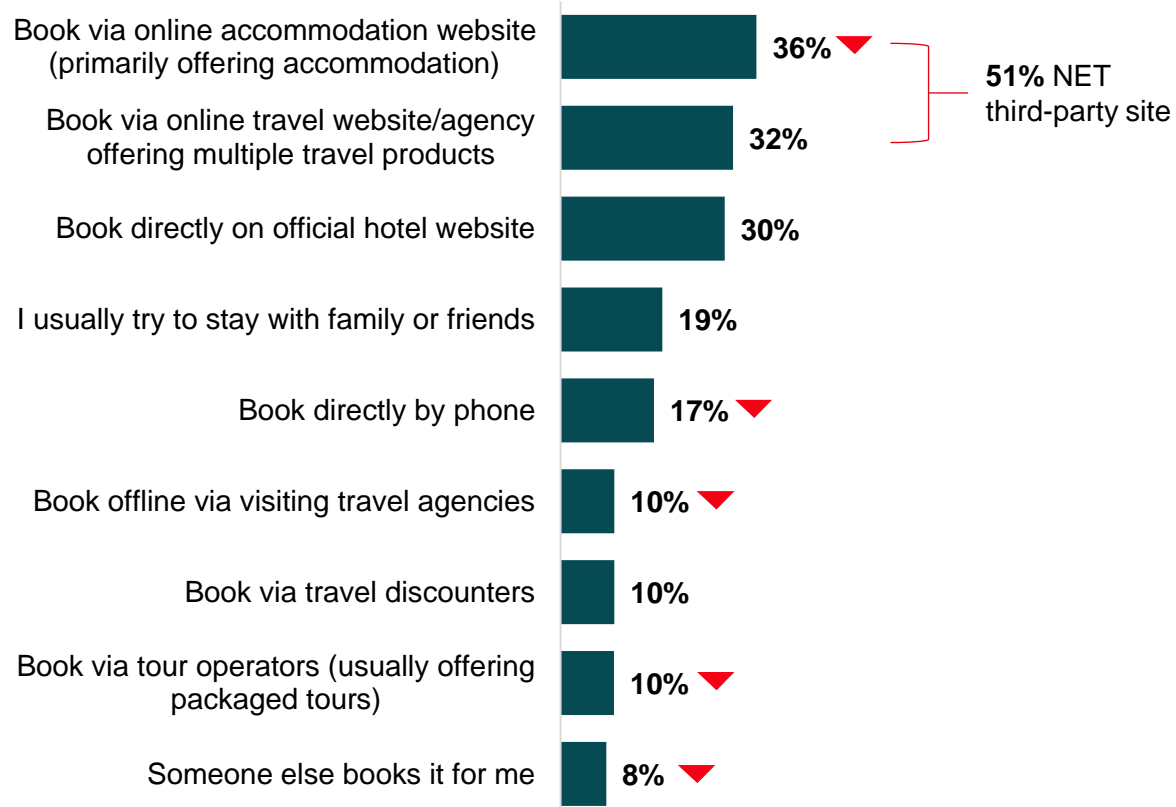


# Accommodation Booking Methods

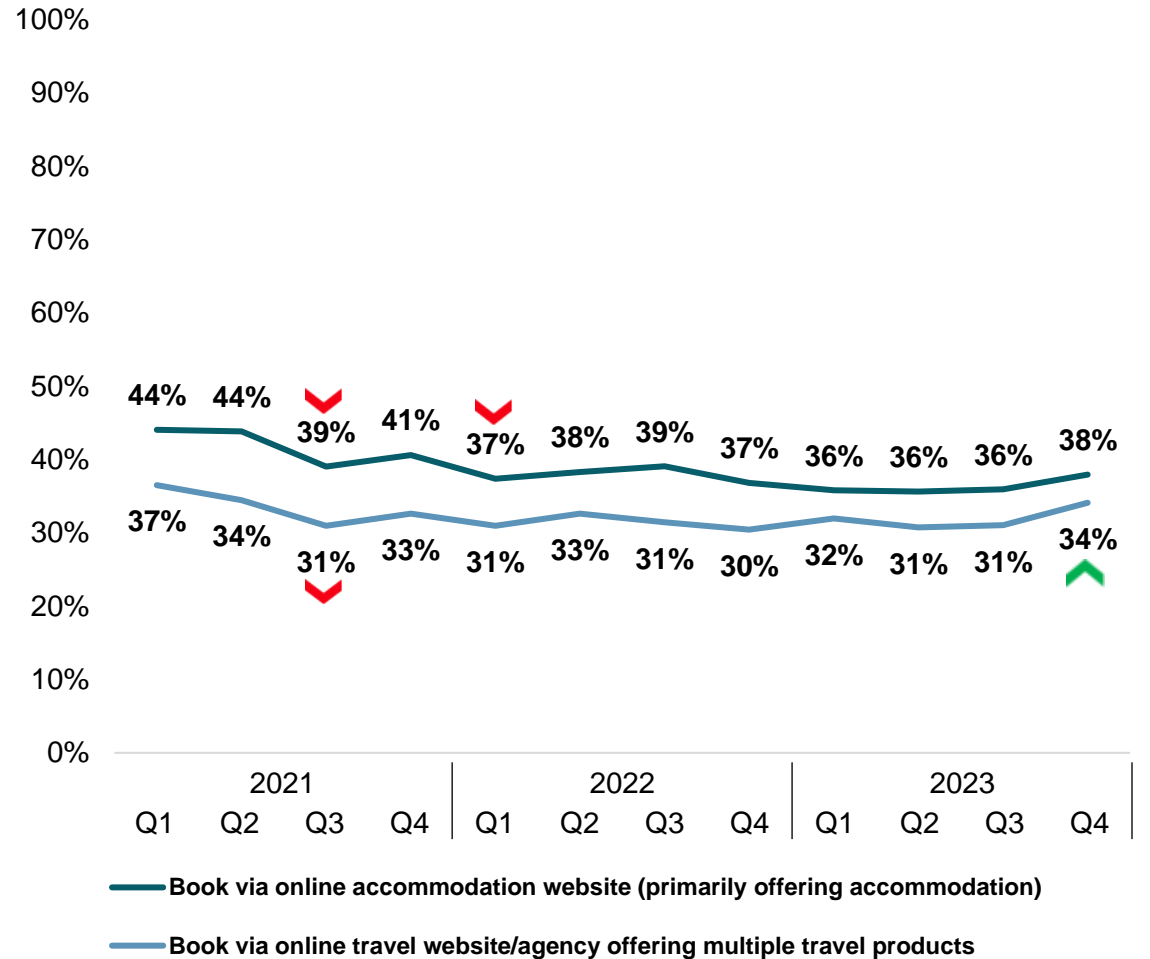


Half of Australians opt to use third-party sites when booking accommodation; however, use of online accommodation websites such as Airbnb and Trivago is down year-over-year, potentially a reflection in the declining use of rentals

## Accommodation Booking Methods



## Select Accommodation Booking Methods (Trended)

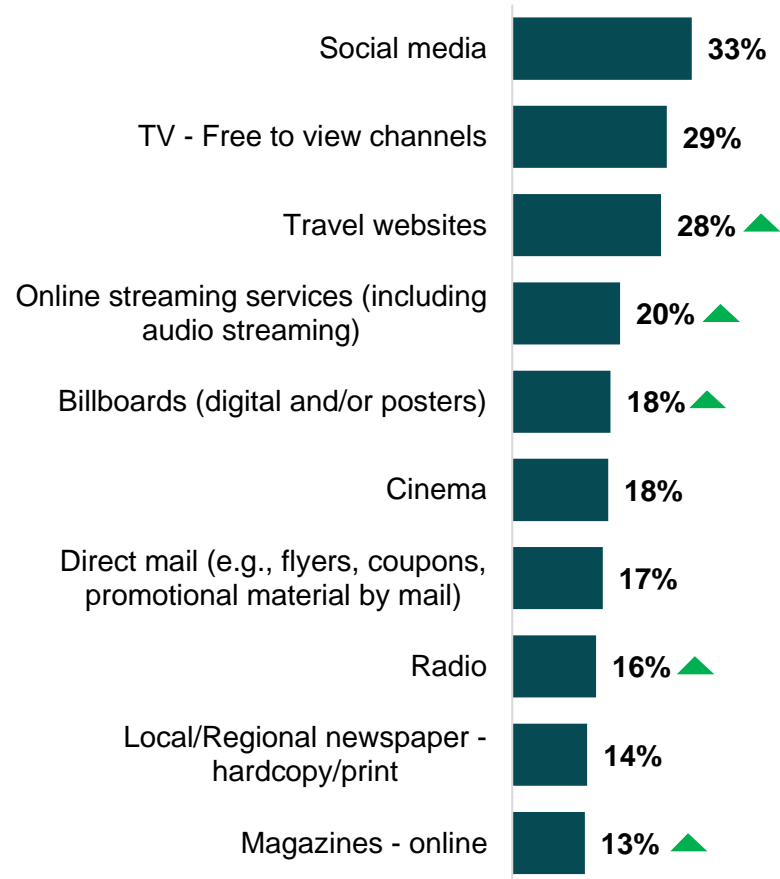


# Effective Types of Travel Advertising

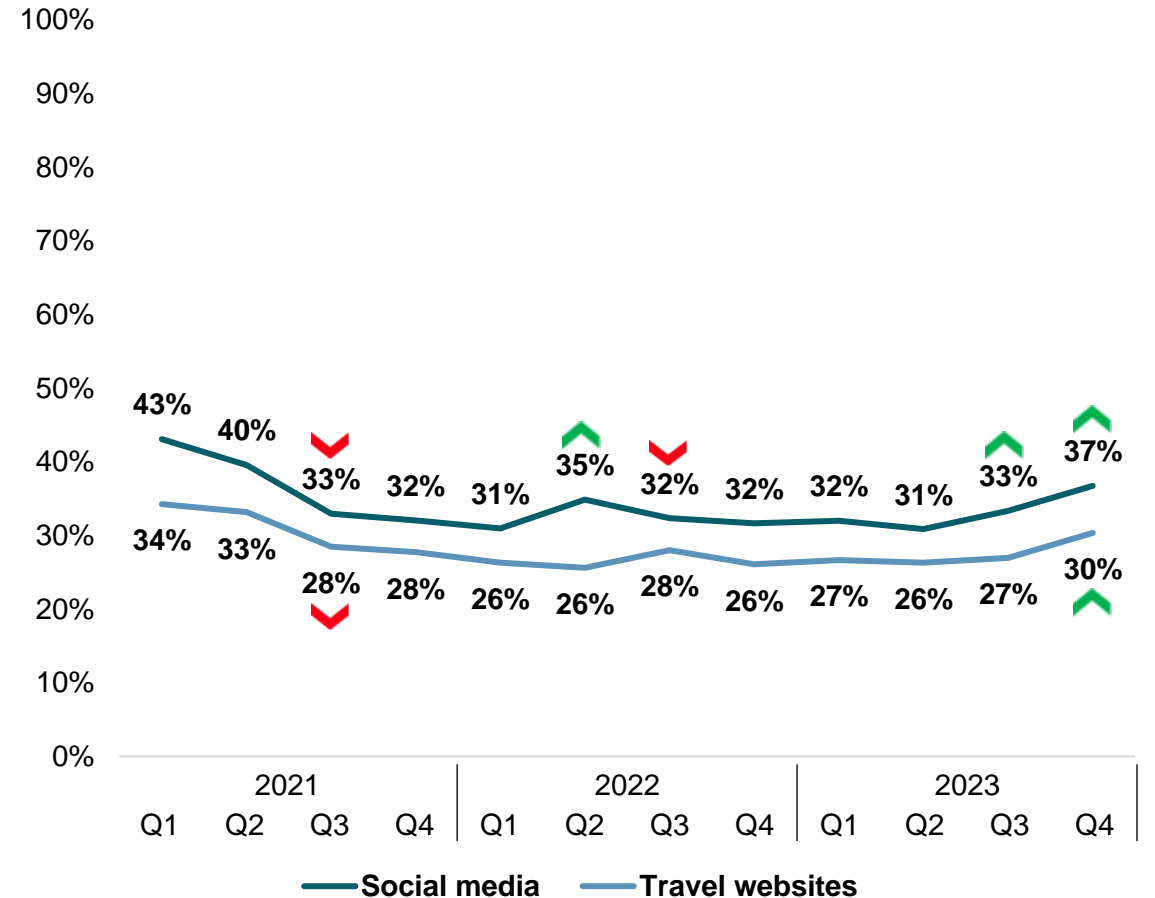


Social media, broadcast TV, and travel websites are the advertising channels that Australians identify as most effective

## Effective Types of Travel Advertising (Top Responses)



## Select Types of Travel Advertising (Trended)



2023 Base: Australians 18+ (n=16,351)  
 2021-2023 Quarterly Trending Base Range: Australians 18+ (n=1,076-4,175)  
 Q: Thinking about your next travel- or vacation-related purchase, if you were a travel/vacation provider where would you advertise to catch your attention? Please select all that apply.





# Performance of Canada in 2023 vs. Competitors



Yellowknife  
Northwest Territories



# Performance Scorecard for Canada

Metric		Definition		Question Text
Total Impression	→	The degree to which consumers feel they know and understand a brand, beyond just being aware of its existence. Total impression = positive + negative impression	→	Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?
Consideration	→	The number of consumers who would consider the destination when they are next in market to plan a vacation.	→	When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?
Positive Recommend	→	How likely consumers are to recommend a destination to a friend or colleague.	→	Which of the following destinations would you RECOMMEND to a friend or colleague?
Destination Health Index	→	Overall measure of a destination's brand health across several key destination health metrics.	→	Average of Positive Impression, Positive Reputation, Positive Quality, Positive Value, Positive Satisfaction, Positive Recommend
Positive Reputation	→	How much consumers like and respect a destination.	→	Which of the following destinations do you regard as having a GOOD reputation for vacations?
Positive Buzz	→	How much positive news coverage consumers are hearing about a destination.	→	Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?
Ad Awareness	→	How much advertising consumers have seen for a destination.	→	Which of the following destinations have you seen an advertisement for in the PAST TWO WEEKS?
Word of Mouth	→	How much consumers are talking about a destination.	→	Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?

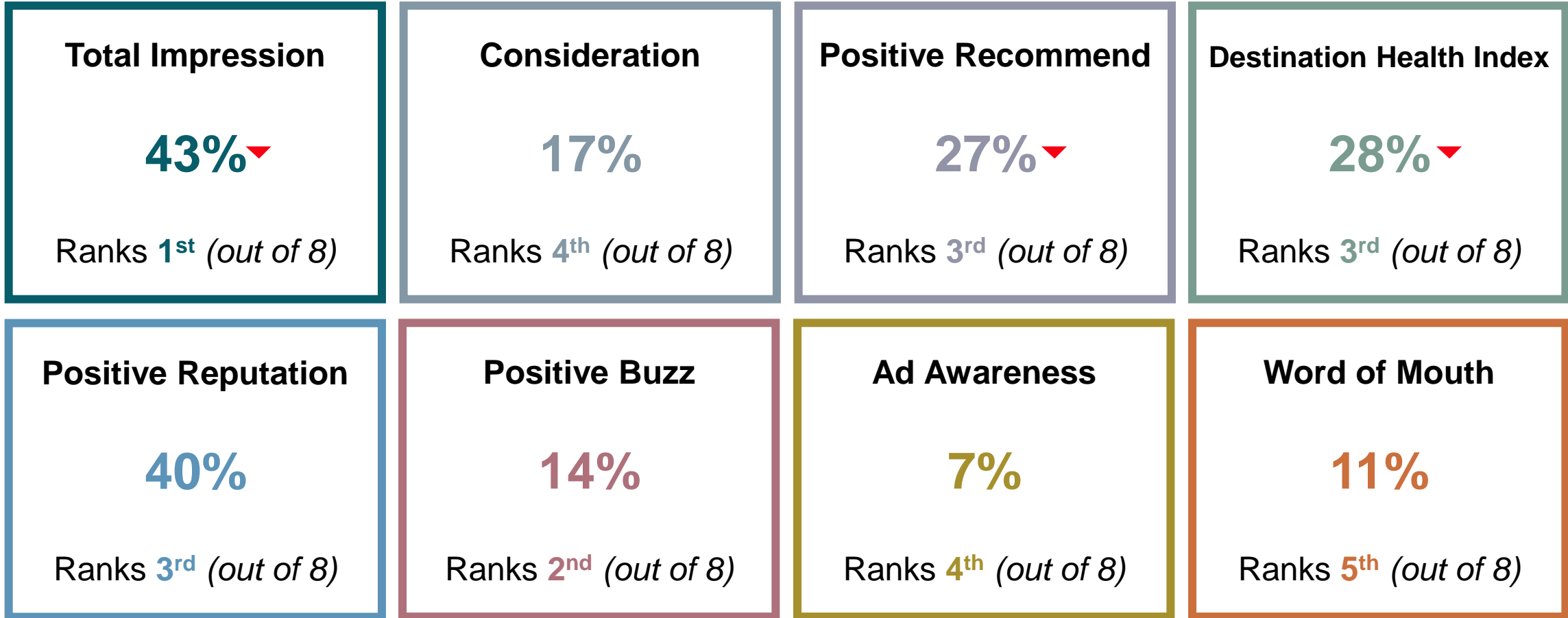




# Performance Scorecard for Canada



Canada performed well in Australia in 2023, ranking 1<sup>st</sup> (out of 8 destinations) for total impressions and 2<sup>nd</sup> for positive buzz. Canada also ranked 3<sup>rd</sup> for three additional metrics. However, despite the high rankings, scores for Canada are down year-over-year in three metrics



# 2023 Annual Scores



Japan is the top performing destination within the competitive set, ranking first in six of eight metrics and seeing year-over-year growth in buzz, ad awareness and word of mouth. Like many other competitors, Canada saw its recommend and overall destination health scores decline. Ad recall for the US increased, as did its scores for recommend, overall destination health and buzz.

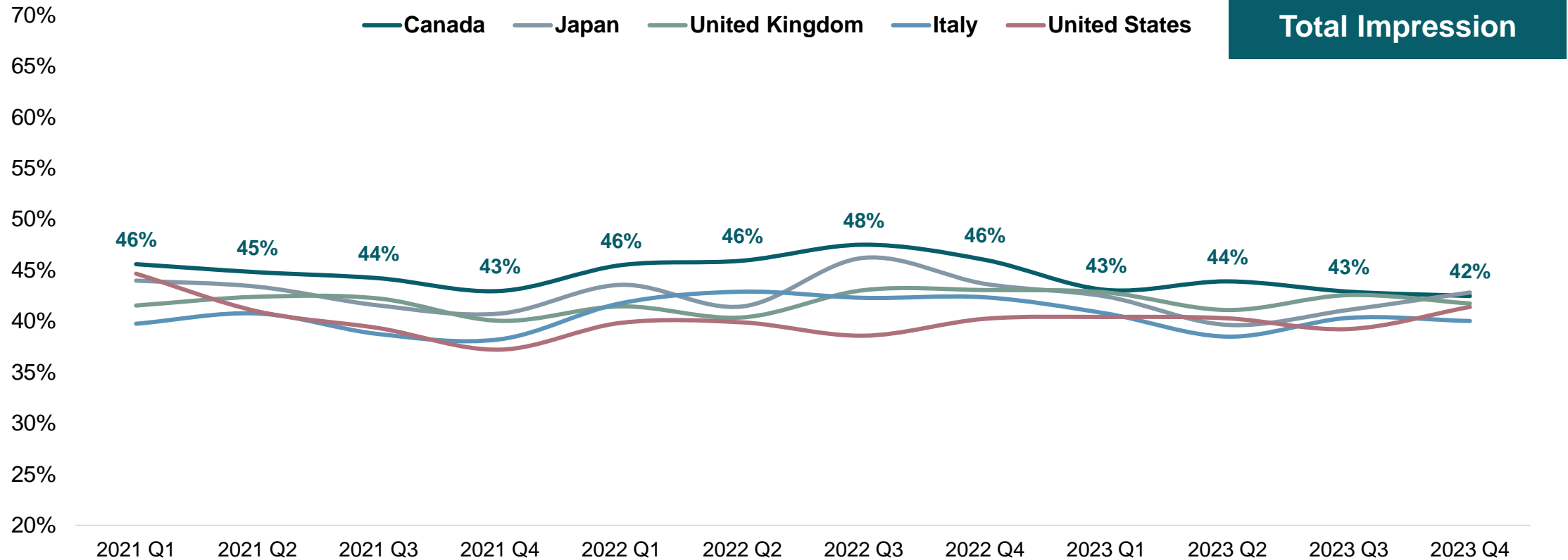
	Canada	Japan	UK	Italy	France	US	Spain	Germany
Total Impression	43% ▼	42%	42%	40%	37% ▼	40%	30%	33%
Consideration	17%	22%	17%	17%	14%	13%	12%	11%
Positive Recommend	27% ▼	28% ▼	27% ▼	28%	24% ▼	19% ▲	20%	19% ▼
Destination Health Index	28% ▼	30%	27%	29% ▼	24% ▼	19% ▲	20% ▼	21% ▼
Positive Reputation	40%	43%	34%	40%	33% ▼	25%	30%	25%
Positive Buzz	14%	20% ▲	14%	14%	10%	9% ▲	9%	8% ▲
Ad Awareness	7%	12% ▲	7%	6%	4%	7% ▲	3%	3%
Word of Mouth	11%	17% ▲	14%	11%	10%	14%	6%	6%



# Total Impression: Positive + Negative Impression (Trended)



Canada has consistently outpaced its competitors in terms of total impression. However, in 2023, Canada's score declined, bringing it to the same level as with Japan.



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#1	#2
<b>Top Ranked Destination</b>	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Canada	Japan

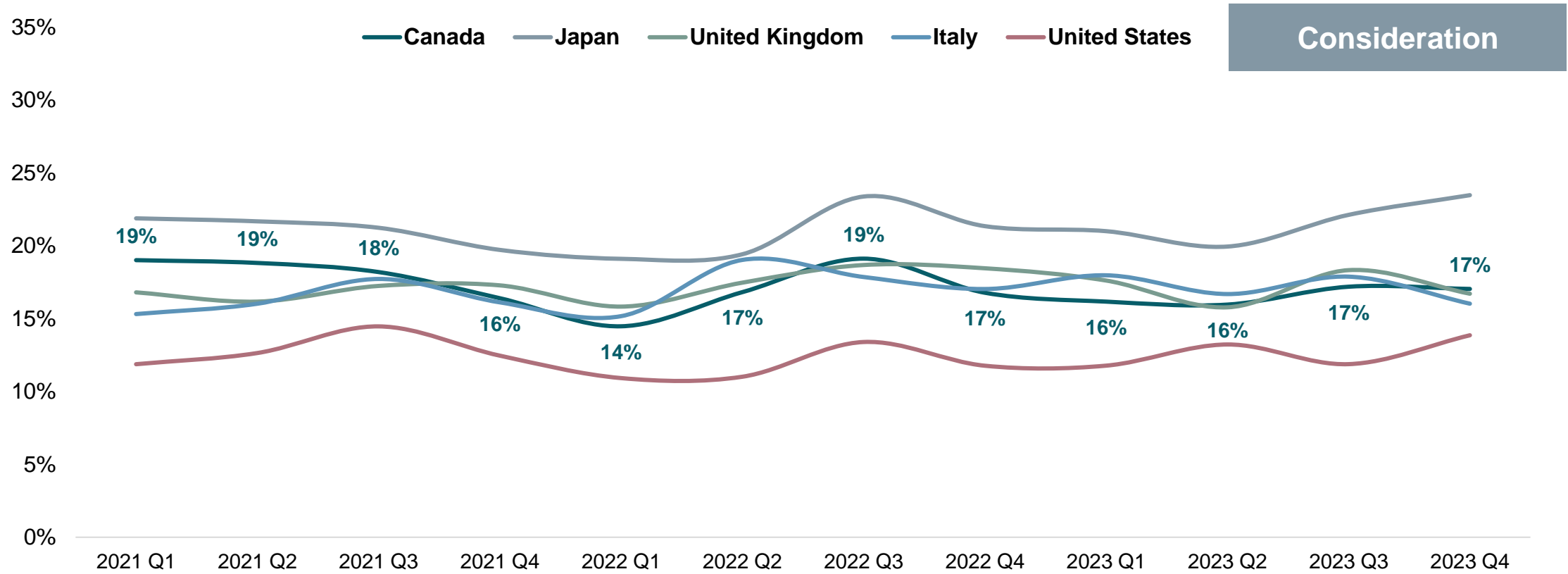
23 2021-2023 Quarterly Trending Base Range: Australians 18+ (n=1,261-2,621)  
 Q: Overall, of which of the following destinations do you have a POSITIVE impression? / Now which of the following destinations do you have an overall NEGATIVE impression?



# Consideration (Trended)



Japan leads the competitive set in consideration; its consideration increased in mid-2022 and has maintained this level throughout 2023. Canada, the UK and Italy form a second tier of destinations, with consideration scores that have been near-level over the last 3 years



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#2	#2	#2	#3	#4	#4	#2	#4	#4	#3	#4	#2
<b>Top Ranked Destination</b>	Japan	Japan	Japan	Japan	Japan	Japan	Japan	Japan	Japan	Japan	Japan	Japan

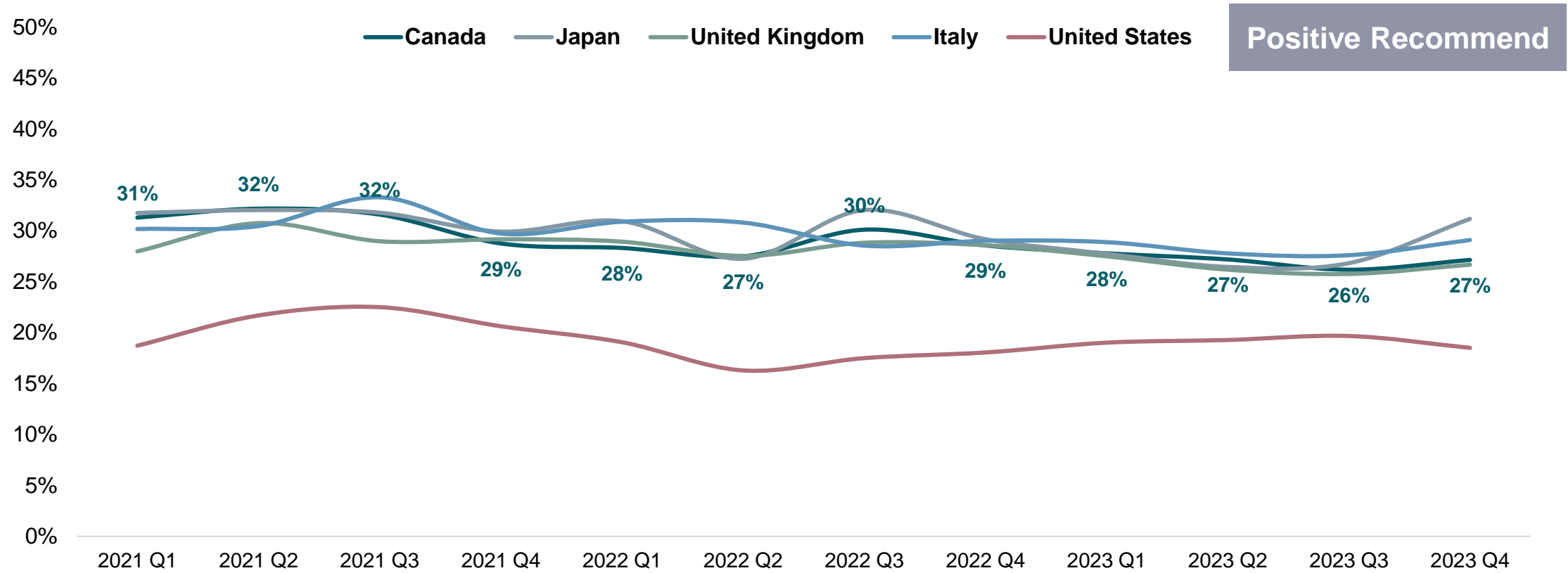
24 2021-2023 Quarterly Trending Base Range: Australians 18+ (n=1,261-2,621)  
Q: When you are in the market next to plan a vacation or a fun day out for yourself / your family, which destinations would you consider?



# Positive Recommend (Trended)



Recommendation scores for the top four long-haul destinations are near-level with each other, separated by only one percentage point in 2023. While the US has seen year-over-year growth in recommendations, its score is down compared to 2021



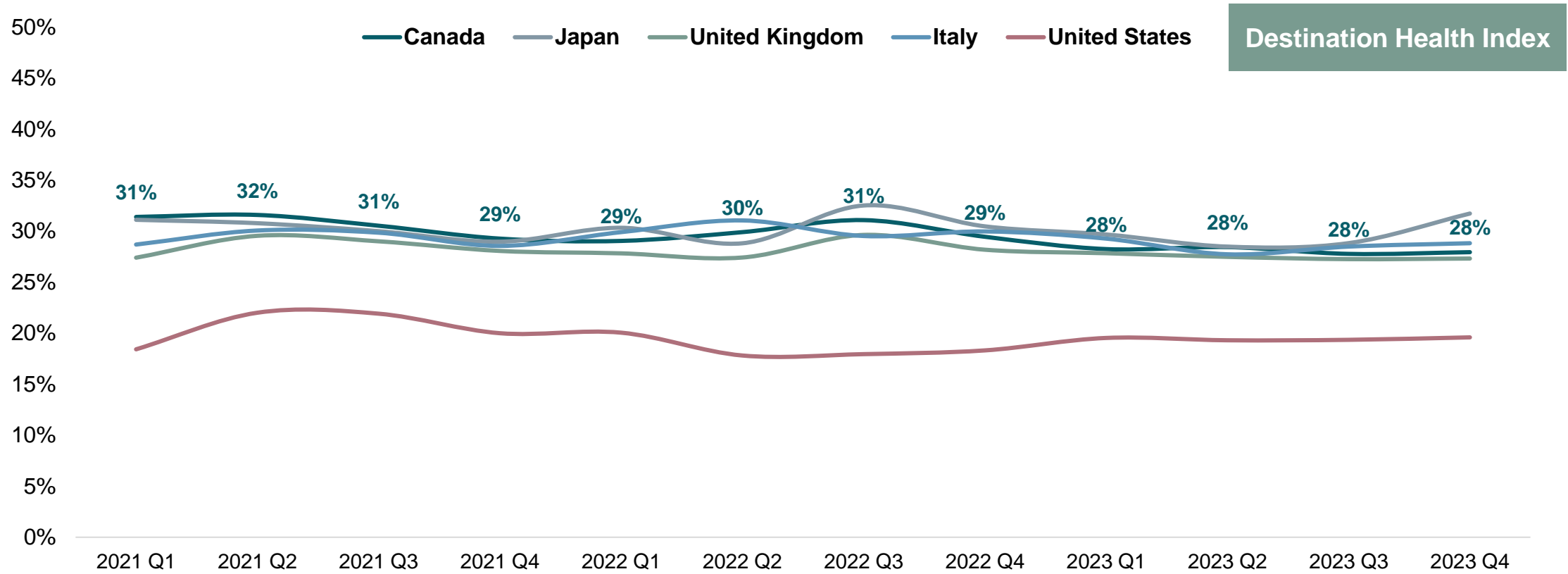
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#2	#1	#3	#4	#4	#3	#2	#4	#2	#2	#3	#3
<b>Top Ranked Destination</b>	Japan	Canada	Italy	Japan	Japan	Italy	Japan	Japan	Italy	Italy	Italy	Japan



# Destination Health Index (Trended)



While Canada led the competitive set marginally in overall destination health in 2021 it has since been overtaken by other top destinations, but remains in close competition. The US has increased year-over-year but trails the top destinations by a considerable margin



	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#1	#1	#1	#3	#2	#2	#3	#3	#2	#3	#3
<b>Top Ranked Destination</b>	Canada	Canada	Canada	Canada	Japan	Italy	Japan	Japan	Japan	Japan	Japan	Japan

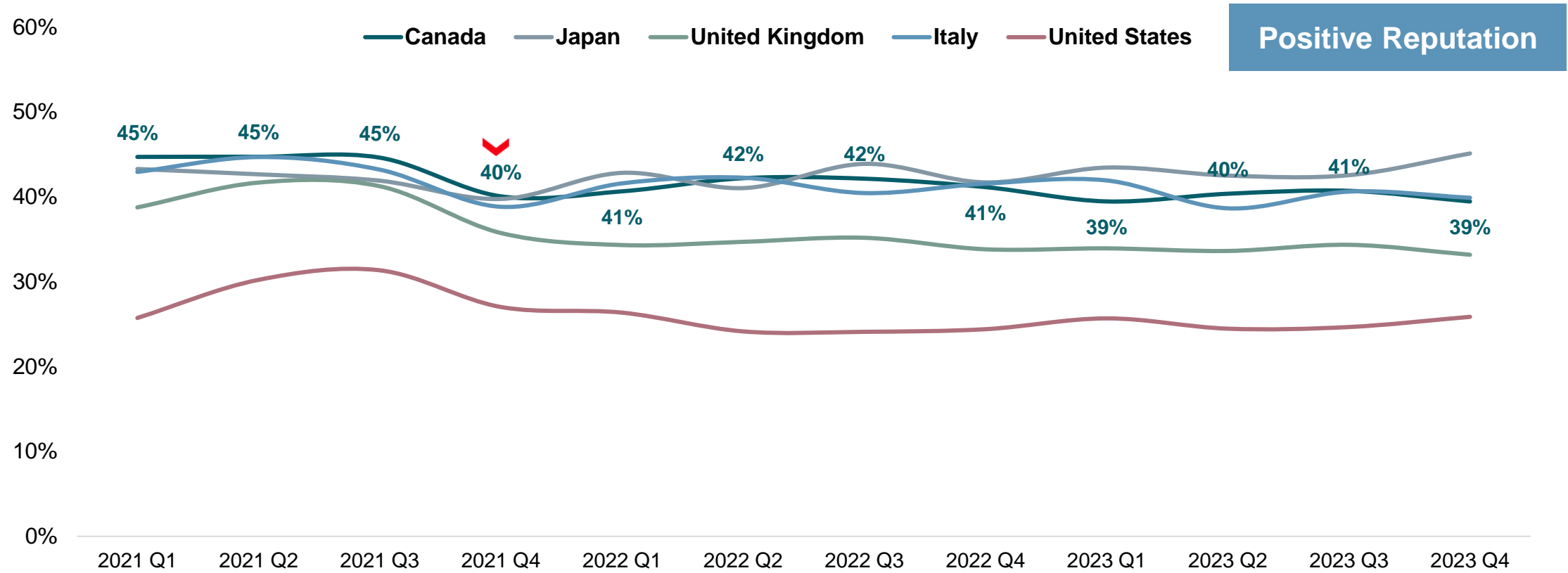




# Positive Reputation (Trended)



Canada ranked first in reputation in 2021. However, scores have since fallen and have yet to recover

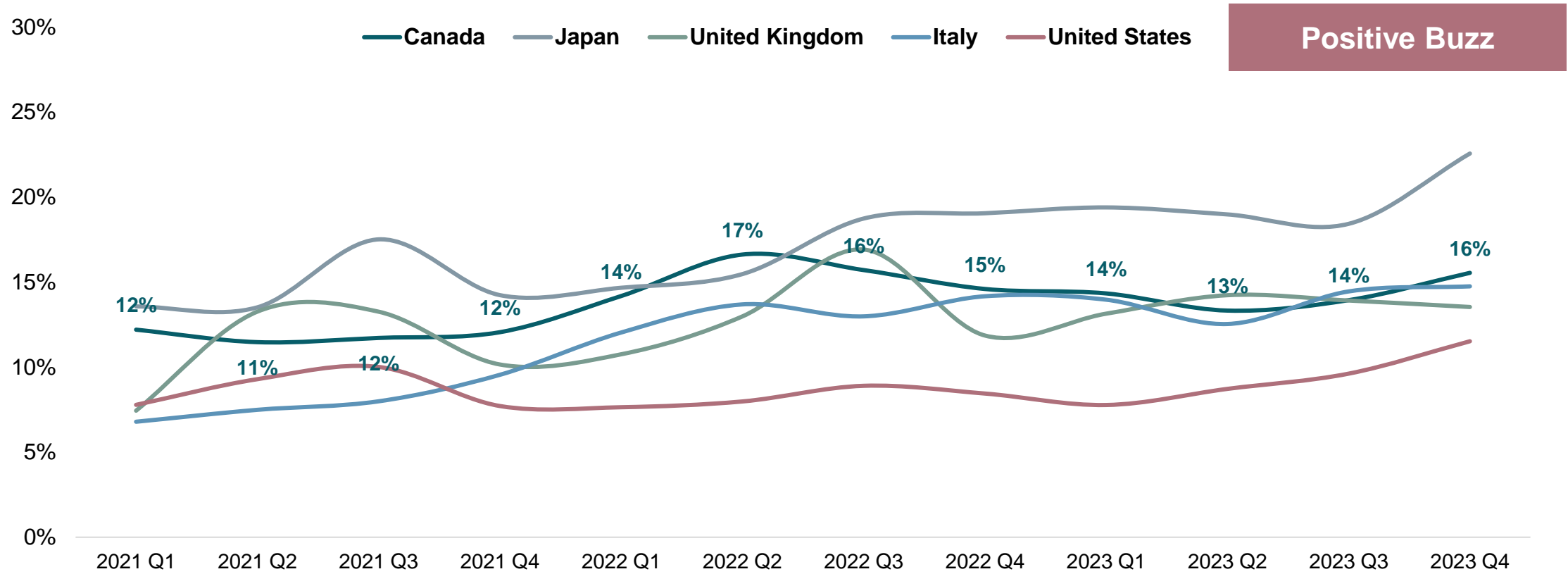


	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#1	#1	#1	#1	#3	#2	#2	#3	#3	#2	#2	#3
<b>Top Ranked Destination</b>	Canada	Canada	Canada	Canada	Japan	Italy	Japan	Japan	Japan	Japan	Japan	Japan

# Positive Buzz (Trended)



Japan not only leads the competitive set in positive buzz but has also seen significant year-over-year growth in the metric. Buzz for the US has surged over the latter half of 2023



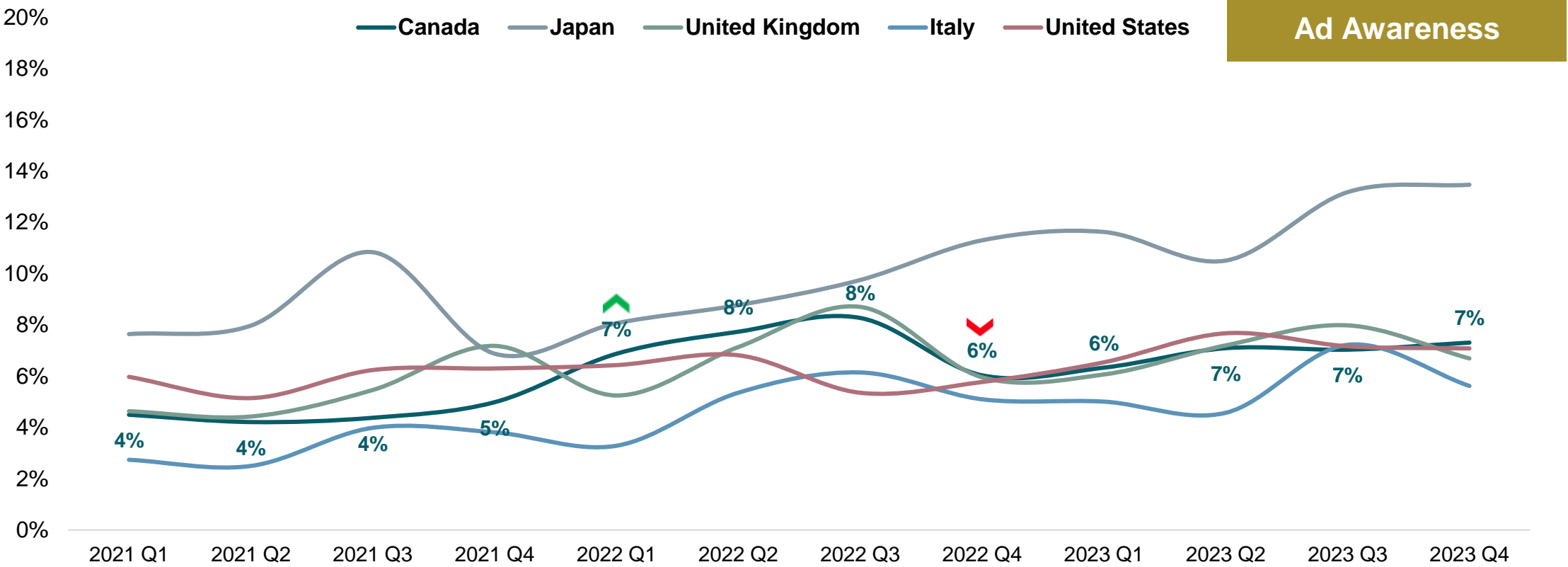
	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#2	#3	#3	#2	#2	#1	#3	#2	#2	#3	#3	#2
<b>Top Ranked Destination</b>	Japan	Japan	Japan	Japan	Japan	Canada	Japan	Japan	Japan	Japan	Japan	Japan

28 2021-2023 Quarterly Trending Base Range: Australians 18+ (n=1,261-2,621)  
 Q: Over the PAST TWO WEEKS, which of the following destinations have you heard something POSITIVE about (whether in the news, through advertising, or talking to friends and family)?



# Ad Awareness (Trended)

Ad recall for both Japan and the US has increased compared to 2022

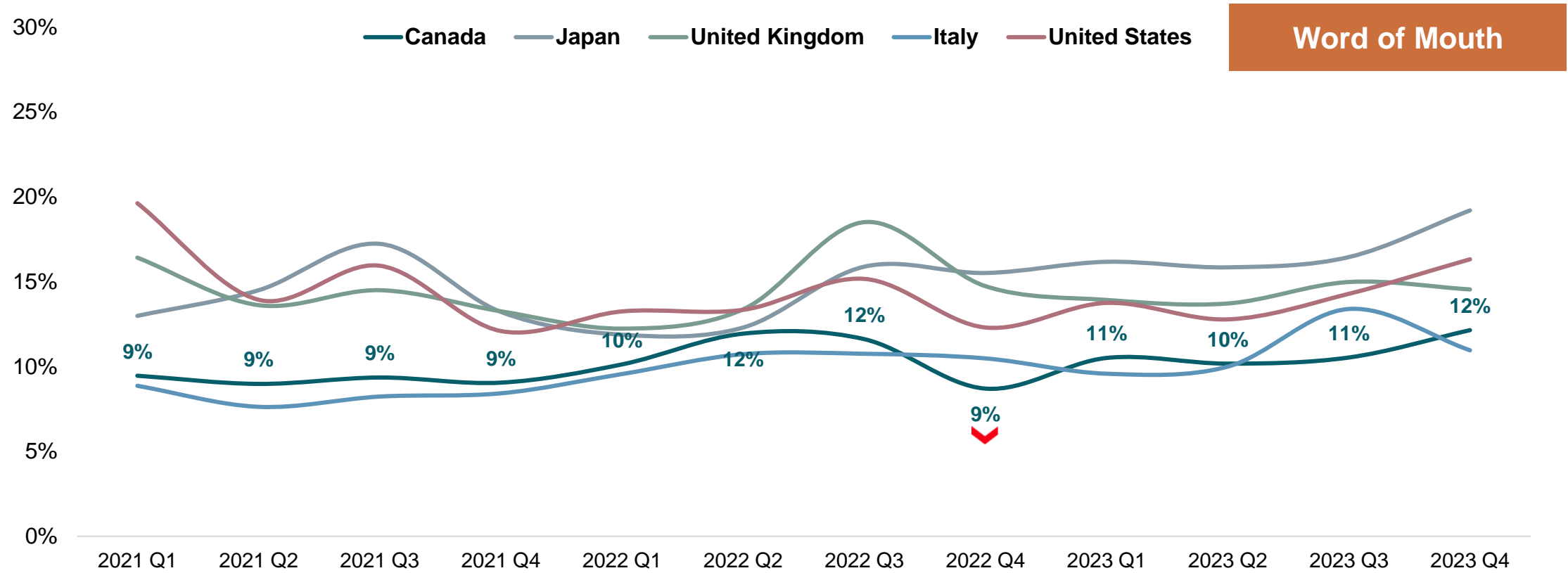


	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#4	#4	#4	#2	#2	#3	#2	#3	#4	#5	#2
<b>Top Ranked Destination</b>	Japan	Japan	Japan	UK	Japan	Japan	Japan	Japan	Japan	Japan	Japan	Japan

# Word of Mouth (Trended)



Japan has seen significant year-over-year growth in word of mouth, as more Australians are speaking about the destination than in 2022



Word of Mouth

	2021 Q1	2021 Q2	2021 Q3	2021 Q4	2022 Q1	2022 Q2	2022 Q3	2022 Q4	2023 Q1	2023 Q2	2023 Q3	2023 Q4
<b>Canada's Rank</b>	#4	#4	#4	#5	#4	#4	#4	#6	#4	#4	#6	#4
<b>Top Ranked Destination</b>	US	Japan	Japan	UK	US	UK	UK	Japan	Japan	Japan	Japan	Japan

30 2021-2023 Quarterly Trending Base Range: Australians 18+ (n=1,261-2,621)  
 Q: Which of the following destinations have you talked about with friends and family in the PAST TWO WEEKS (whether in-person, online, or through social media)?



# THANK YOU

For any questions, please reach out to [research@destinationcanada.com](mailto:research@destinationcanada.com)



CANADIAN TOURISM DATA  
**collective**