

**WANDERLUST
OR WANDERBUST?
TRAVEL MARKETING IN
A NEW AUSTRALIA**

EXECUTIVE SUMMARY

We all know that in order to support our economy, and the 312,000 businesses linked to our tourism industry, Australians need to invest both time and money in seeing our country.

THE SENTIMENT IS POSITIVE, BUT WILL THE INVESTMENT FOLLOW?

84% are more interested in exploring Australia since COVID. But the unanswered challenge remains: how can we unlock the level of spend traditionally reserved for travelling overseas?

Right now, only 1 in 3 people plan to spend the same amount of time and money travelling domestically as they would if they were headed abroad; and there's lot of work to do, and opportunity to be had, in shifting attitudes so our destinations and tourism operators are sought-after; rather than a second resort.

HOW DO WE MOVE AUSTRALIANS TO SEE OUR COUNTRY AS A CULTURE WORTH EXPERIENCING?

Together, we need to override the inertia — moving Australians to overcome our decades-old cultural cringe, to unpack a

deeply entrenched second-best psyche, and undo any preconceived notions that what's going on "over there" is more culturally enriching and worthy of our most precious resources: money and time.

And to do that, we need to convince Australians that our destinations aren't just places — they are cultural experiences every bit worthy of their investment; experiences that are at their very best in this moment — uncrowded, safe, restorative and inspiring.

HOLIDAYING HERE IS PERCEIVED AS A COMPROMISE. AND THAT NEEDS TO CHANGE.

Wanderlust Or Wanderbust was created to help Australia's tourism and travel bodies, brands and operators achieve that goal. To flip the switch and show Australians what the rest of the world sees — something fresh, exotic and untapped.



Hamersley Gorge, Karijini Nation Park, Western Australia

OUR APPROACH

01

Social intelligence and AI led organic topic discovery involving the exploration and interpretation of 100,000+ online travel conversations to identify the shifts in narrative, sentiment and cultural meaning of domestic travel in Australia over the last year.

02

In-depth interviews with leading industry experts to hear their insider perspective on what they see as the best strategies forward

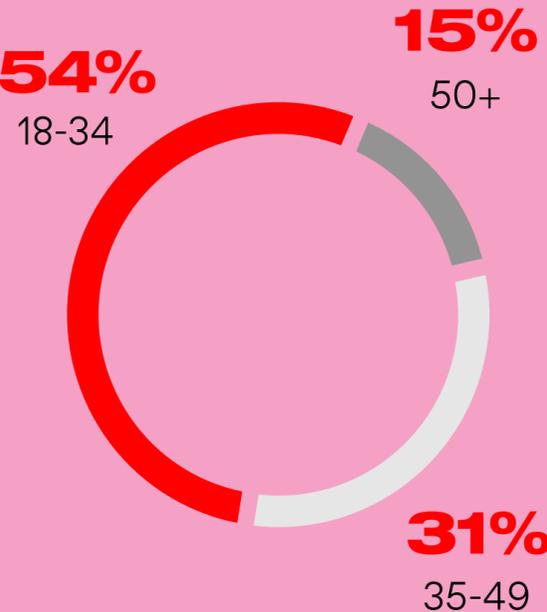
03

A quantitative online survey amongst n=1691 Urban List readers which included association tasks leveraging neuroscience techniques and split cell exposure and response to an array of travel marketing material.

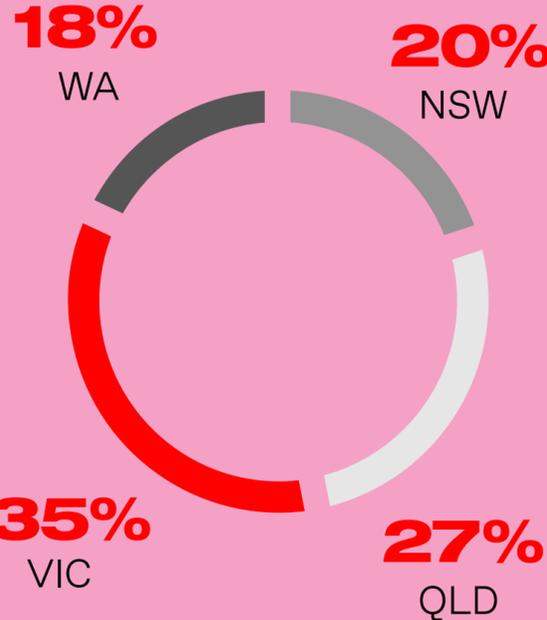
● Cradle Mountain, Launceston, Tasmania

SURVEY RESPONDENTS

AGE



LOCATION



A DOMESTIC LED RECOVERY - FACT OR FICTION?

In August 2020, Tourism Research Australia published an insightful, and in many aspects, uplifting report outlining the important role of domestic travel in Australia's tourism recovery — **Moving Forward**.

The report acknowledged our current state — devoid

of international visitation for the foreseeable future, border closures, record unemployment and a drastic reduction in business travel. All true.

But rather than declare the multi-billion dollar hit a fait accompli, **Moving Forward** focused on articulating the power of

Australians' domestic travel spend and the very real ability for Australians to lead the recovery efforts.

The **9 million international tourists that visited Australia in 2019 contributed \$31 billion** to the economy. That sounds like a lot, and it is.

But you know what?

Australians contributed almost 3 times more — spending \$107 billion on domestic and overnight trips.

We also spent almost twice as much travelling domestically as we did overseas. Our 11.6 million outbound trips were

worth \$65 billion to the global economy.

So the question is, **how do we tap into this 'freed up' \$65 billion resource** — redirecting it to domestic travel, countering the international tourism shortfall, and inspiring a domestic led recovery? →

Source: *Moving Forward: The Role Of Domestic Travel In Australia's Tourism Recovery* - Tourism Research Australia

● Lake Dumbleyung, Western Australia

VISITOR SPEND BY TRAVELLER, 2019

DAY TRIPPERS	26
DOMESTIC OVERNIGHT TRAVELLERS	81
INTERNATIONAL VISITORS	14 31
AUSTRALIANS TRAVELLING OVERSEAS	57 8
MONEY SPENT OVERSEAS (\$bn)	MONEY SPENT IN AUSTRALIA (\$bn)

9 MILLION INTERNATIONAL VISITORS CAME TO AUSTRALIA IN 2019, SPENDING A TOTAL OF \$45 BILLION. WITH ONLY \$31 BILLION OF THIS INTERNATIONAL SPEND REACHING THE AUSTRALIAN ECONOMY, THIS WAS OVERSHADOWED BY THE \$107 BILLION AUSTRALIANS SPENT ON DOMESTIC OVERNIGHT TRAVEL AND DAY TRIPS. IT WAS ALSO SIGNIFICANTLY LESS THAN THE \$65 BILLION SPENT BY AUSTRALIANS ON 11.6 MILLION OUTBOUND TRIPS – HALF OF WHICH WAS HOLIDAY TRAVEL.

TOURISM RESEARCH AUSTRALIA

WHO'S READY TO BOOK?

We need to understand who is ready to travel – not just dream but truly book – and what is going to motivate them to do so repeatedly over the coming year(s). Amongst Urban List readers who typically holiday overseas at least once a year:

- 84% say they're now more interested in discovering more of Australia
- 81% are now more interested in discovering more of their local region
- 85% are more eager to support the economy by

travelling domestically

- 29% are now less interested in international travel

If we can encourage Australians to do one more day trip a year, and spend one more night away, we are beginning to chip away at the deficit international travel has left, contributing an extra \$6.6 billion to the economy. Modest behavioural shifts can and will have a sizeable impact.

Couple this with increasing Australians' average spend per night – a product of

seeing our country and its experiences through a fresh and more desired lens – and we are well on our way.

Of course, encouraging "one more night" above 2019 boom-town levels is easier said than done. Reduced incomes, increased safety concerns and the physical barriers of closed borders has stymied our ability, and in some instances, propensity to explore.

Historically, domestic tourists have had different spending patterns – trips taken by Australians in Australia tended to be shorter, lower

yield and involve fewer activities than those of our international visitors.

But there is a new way to look at segmenting the Australian consumer, zeroing in on those segments that are more adaptable, optimistic, spontaneous and willing to unleash their wanderlust. Those who can be, and want to be, engaged in a way that ignites their desire and ability to explore. Those whose means, and/or dreams have been less significantly impacted than the broader population.

INCREASE IN DOMESTIC SPEND

11 → 12
● DAY TRIPS

19 → 20
○ NIGHTS AWAY

~\$6.6bn
INCREASE IN DOMESTIC TRAVEL SPEND

In 2019, Australians took on average 11 day trips which generated \$26bn. They also spent an average of 19 nights away on overnight travel, generating a further \$81bn. If these averages were to rise to 12 day trips and 20 nights away, this would see an estimated \$6.6bn increase.

Source: Moving Forward: The Role Of Domestic Travel In Australia's Tourism Recovery - Tourism Research Australia



Princes Pier, Port Melbourne, Victoria

A NEW BREED OF HIGH VALUE TRAVELLER

● Alligator's Nest Swimming Hole, Tully Gorge National Park, Queensland

Australia's tourism industry has long espoused the merits of focusing efforts on a high value traveller. The challenge is, who is that HVT as we emerge from a once-in-100-years event?

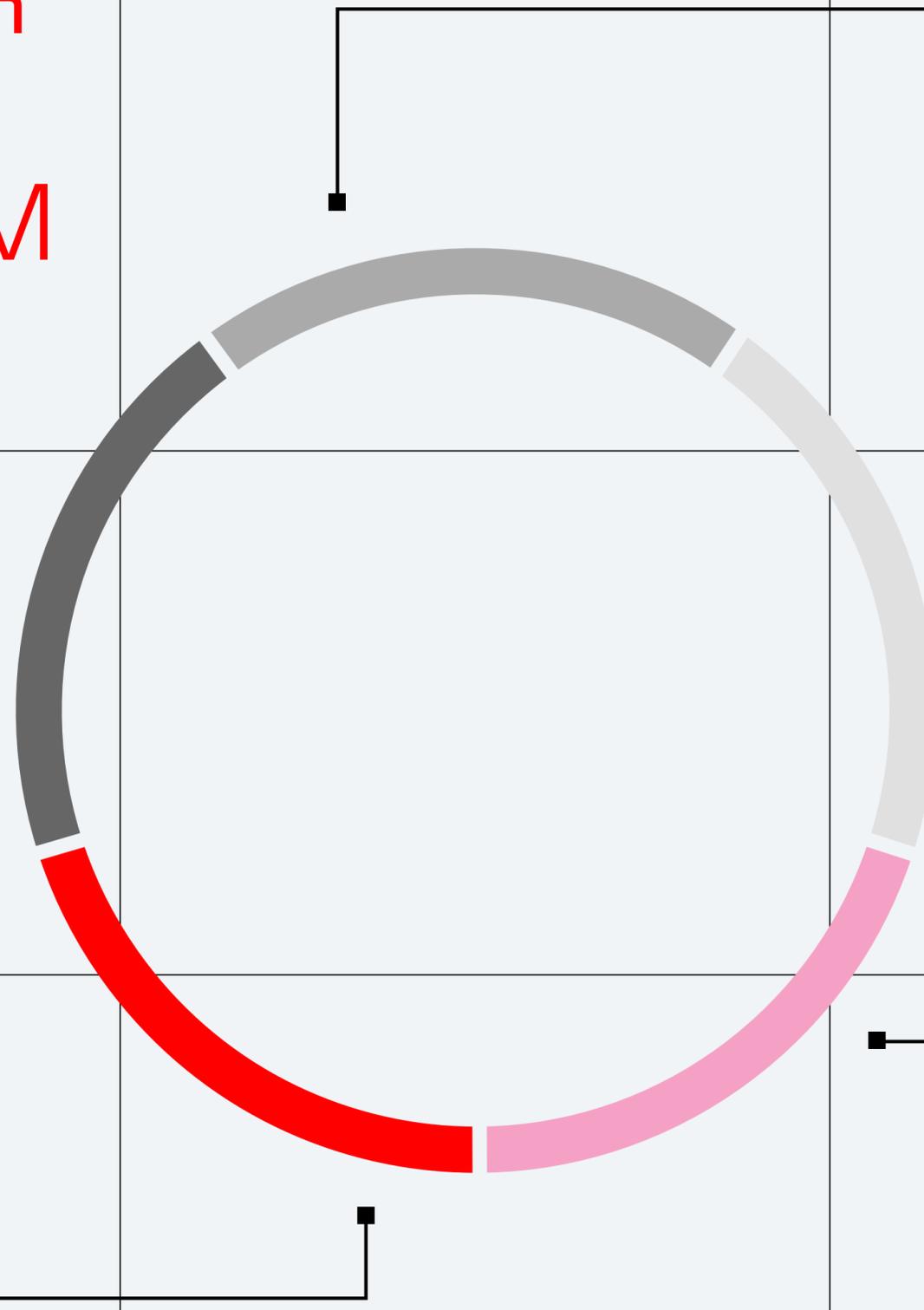
Nature and The Lab conducted a rolling, nationally representative study that took the pulse of more than 8,000 Australians — from the very start of the COVID outbreak, right through to today. Having measured these behaviour and attitude shifts weekly for more than 9 months, patterns began to emerge — and from these patterns, the teams were able to identify and group Australian consumers into 5 key segments, each defined by the way they act, think and observe the world around them. →

NEW CONSUMER SEGMENTS EMERGING FROM COVID-19

→ **START HERE:**

● **RETURNERS**
 Just want things to go back to exactly how they were. Returners won't let COVID change the way they live their lives. Right now, they feel it's every person for themselves.

● **OPPORTUNISTS**
 The least worried segment, Opportunists see this as the re-set needed to re-evaluate how they were living. They are excited about future opportunities and ready to get back to normal life.



● **SAFETY SEEKERS**
 Very worried about the future & fear they (or someone they know) will contract the virus. Unable to fully relax until there is a vaccine, Safety Seekers are very careful about who they see and where they go. With this self imposed caution, keeping up with their social network has become increasingly important.

● **STRUGGLERS**
 Also very worried, Strugglers expect the next few years will be very difficult financially and saving has become more important than ever before. Strugglers have an individualistic view of the world, right now they feel it is every person for themselves.

● **SIMPLIFIERS**
 Also concerned about their finances and focused on saving money, Simplifiers have re-evaluated what they spend their money on as a result of recent experiences. What they want out of life is different now than it was before, they want to live a simpler life when this is over.

Source: COVID-19 Brand Navigator Study, Nature and The Lab | 2020

“ WE HAVE IDENTIFIED TWO FRESH TARGET GROUPS – OPPORTUNISTS AND SIMPLIFIERS – AS THE CONSUMERS MOST LIKELY TO EMBRACE, AND INVEST IN DOMESTIC TOURISM EXPERIENCES ”

From the consumer segmentation, we have identified two fresh target groups – Opportunists and Simplifiers – as the consumers most likely to embrace and invest in domestic tourism experiences; the new face of the recovery providing the picture of Australia we paint is one that inspires.

These two segments are more optimistic than the others: more adaptable, ready for new opportunities and largely positive about what is to come. They have taken this time to reflect and reevaluate, and ultimately want to experience more out of life as a result of what’s gone down in 20/21.

Largely, Opportunists earn well and have been less financially impacted than most: which likely helps them to see the bright side of things. They think it was the reset we all needed, are able to adapt quickly to change and are excited by what the future holds.

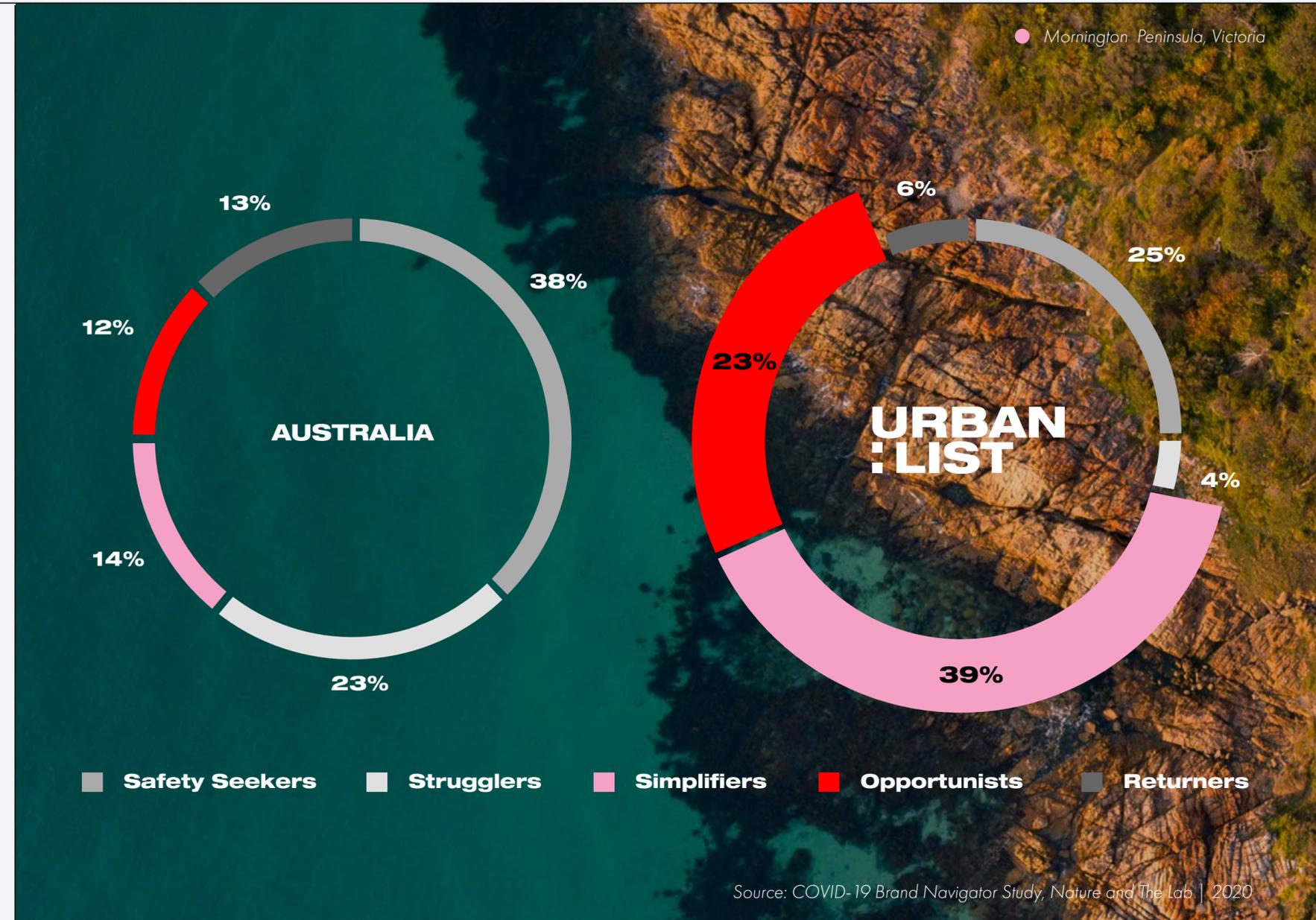
Simplifiers, on the other hand, have been financially impacted by the downturn in the economy. They have reevaluated what they want from life as a result, and rather than ditch their aspirations, are channeling their energy into finding new ways to achieve their goals.

And the thing both groups have in spades is a continued

desire to invest in experiences. The experience economy is still alive and well, despite some pretty obvious setbacks, and with our domestic borders opening again, they’re ready to re-engage with the most sought after experience of all: travel.

While we are certainly fairing better than most, as a nation, we are not on the other side of this crisis yet. **Changes will continue to roll; and if the early days of 2021 are anything to go by, curve balls are still coming.**

To thrive, we need to find customers who are willing to shift with us, our sectors and our businesses.



	THIS IS THE RESET WE NEEDED TO RE-EVALUATE HOW WE'RE LIVING	I'M EXCITED ABOUT THE OPPORTUNITIES THAT WILL ARISE OUT OF THE CRISIS	I'M NOT CONCERNED ABOUT COVID AND I'M READY TO GET BACK TO NORMAL LIFE	I SEE MYSELF SPENDING MORE ON EXPERIENCES THAN ON PRODUCTS IN THE FUTURE	I WILL NOT LET COVID CHANGE THE WAY I LIVE MY LIFE
SIMPLIFIERS	78% ▲	45% ▲	19%	46%	50%
OPPORTUNISTS	81% ▲	51% ▲	45% ▲	45%	62% ▲
AUSTRALIAN AVERAGE	65%	36%	29%	32%	46%

▲ Significant difference vs. Average Australia

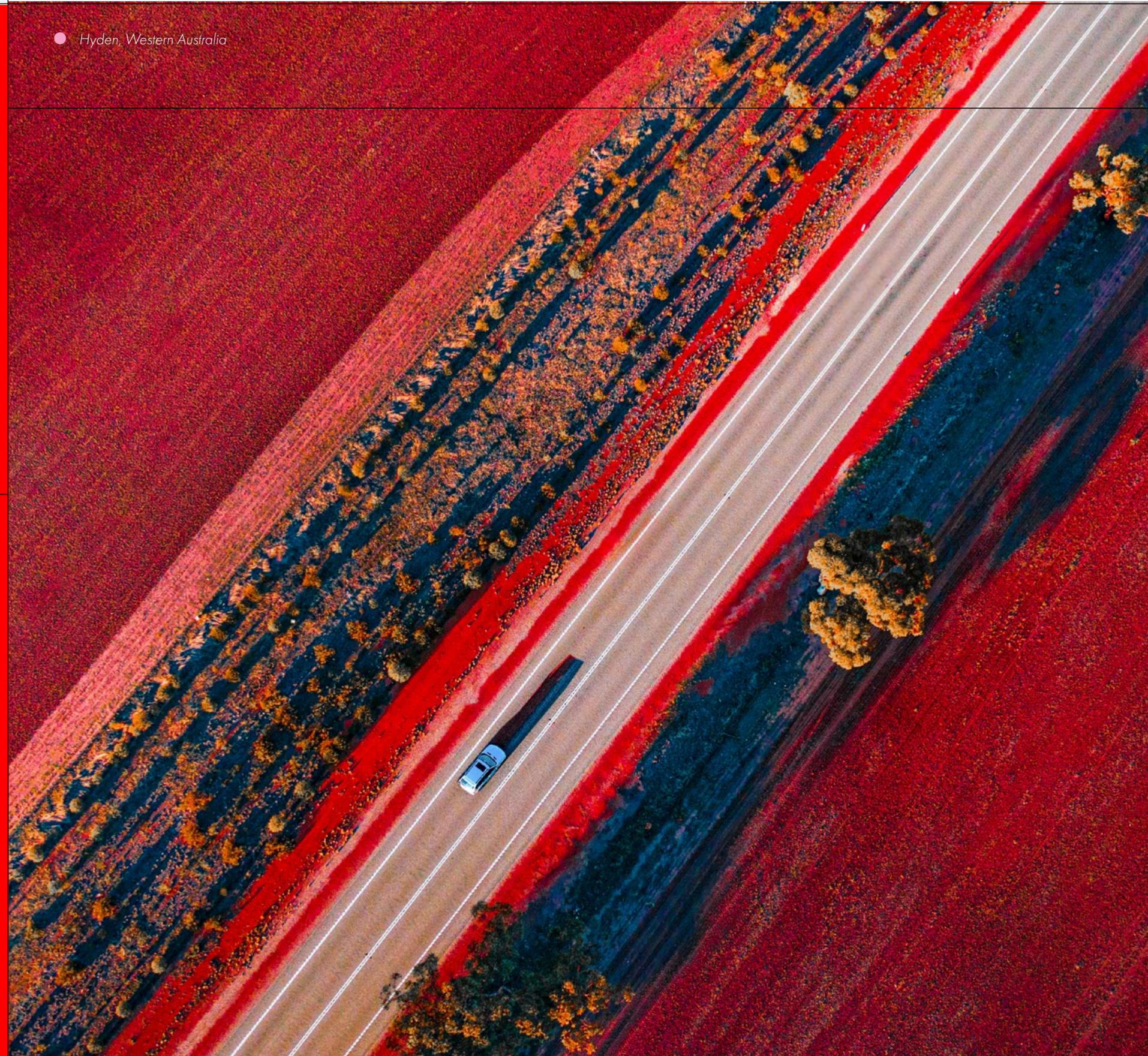
“

THESE OPPORTUNISTS AND SIMPLIFIERS WILL BE YOUR SHINING LIGHTS — PEOPLE THAT CAN BE RELIED UPON TO BOUNCE BACK, ROLL WITH THE PUNCHES AND GET EXCITED BY NEW IDEAS AND NEW PERSPECTIVES.

SUSANNAH GEORGE, FOUNDER & CEO, URBAN LIST

”

● Hyden, Western Australia



ARE MORE INTERESTED
IN DISCOVERING
MORE OF AUSTRALIA
SINCE COVID



PLAN TO SPEND THE
SAME AMOUNT OF TIME
AND MONEY TRAVELLING
DOMESTICALLY AS THEY
WOULD IF THEY WERE
HEADED OVERSEAS

In good news, 84% are more interested in discovering more of Australia since COVID. More than 1 in 3 say they're less interested in overseas travel. And there is significant overlap between their primary travel motivators — safety, nature, relaxing, food and unique experiences and sights — and Australia's authentic offering.

Where the challenge lies, though, is with regard to unlocking the level of spend traditionally associated with travelling overseas — the significant and transformative breaks in which we are happy to live large, invest in the moment, and spend spontaneously.

Right now, only 1 in 3 people plan to spend the same amount of time and money travelling domestically as they would if they were headed overseas.

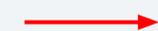


REPOSITIONING BRAND AUSTRALIA FOR AUSTRALIANS

In November 2020, we conducted extensive qualitative and quantitative research:

- Analysing 1600+ responses to tourism marketing stimulus;
- Scanning the sentiment of 100,000+ travel-related social posts;
- And conducting one-on-one interviews with industry experts; looking for clues to support the industry in cutting through.

Through our research, three core questions emerged...



01 DREAM VS DUTY

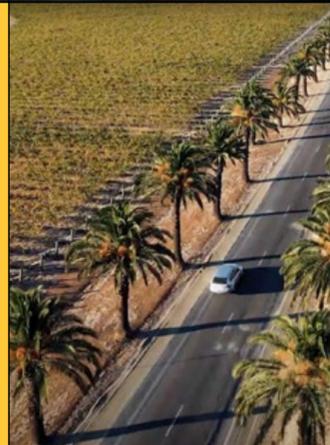


Image Credits: Tourism Western Australia, South Australian Tourism Commission, Tourism Australia

HOW DO WE DEFINE THE SPECTRUM?

The rationale behind duty-based marketing is understandable — Australians want to be part of the recovery effort post-bushfires and COVID and culturally, there has been a significant swing toward community-mindedness and supporting small business.

In reality, however, while

supporting the local travel industry and local businesses is seen as positive and gives a 'warm glow' it is not the primary motivator to plan and book a trip. Framing holidaying as a social responsibility is not triggering a sense of anticipation or dreaming. Instead, it grounds holidaying as rational and required.

Traditionally, exclusivity and a sense of limited availability are common ways to create a sense of desirability for a product and destination. Reversing this message can undermine this sense of desirability, reiterating the obstacle that "Australia will always be there — I'll see it later".

DREAM ←

→ DUTY

WHAT THIS IS:

Inspiring Australians to wonder and get excited by the possibilities of travelling their country.

MESSAGING:

Escape, discovery, enjoyment, adventure, luxury and having new experiences.

WHAT THIS IS:

Encouraging Australians to support the travel industry and local communities.

MESSAGING:

Instructive, calling on Australians to do their bit for the good of the community and economy.



● Showground, Camden, New South Wales

“

THE SENTIMENT OF SUPPORTING THE COMMUNITY IS IMPORTANT, BUT IT CAN'T ACTIVATE THE MARKET. YOU NEED MORE THAN THAT BECAUSE YOU NEED TO RECREATE EXCITEMENT FOR TRAVEL. IT CAN BE ONE HOOK FOR A SMALL PORTION OF THE POPULATION, BUT IT WON'T BE ENOUGH.

NICOLAS GRONIER, VICE PRESIDENT MARKETING, ACCOR

”

THE STIMULUS & RESULTS

Australians do want to be part of the recovery effort, but supporting the industry isn't the primary motivator for them to plan and book a trip.

Based on stimulus tested on a sample of 1691 people, creative that focused on aspiration and dreaming outperformed creative that framed holidaying as a social responsibility — both through static and A/V executions.

Exclusivity, scarcity and aspiration are common ways marketers create a sense of desirability; reversing this message undermines that desire.

DREAM

DUTY



**WANDER OUT YONDER
TOURISM WESTERN AUSTRALIA**

Expansive dreamy land far away

**WE'VE MISSED YOU
TOURISM TASMANIA**

The escape you've been dreaming of

**HOLIDAY HERE THIS YEAR
TOURISM AUSTRALIA**

An invitation to still holiday – just here this year

ATTENTION-GRABBING	52%	43%	40%
INTRIGUING	63%	42%	34%
BELIEVABLE	76%	63%	48%
NEWSWORTHY	32%	18%	22%
MAKES ME WANT TO VISIT	80%	55%	45%
WANT TO SHARE IT	51%	33%	31%

Sources: Tourism Western Australia, South Australian Tourism Commission, Tourism Australia

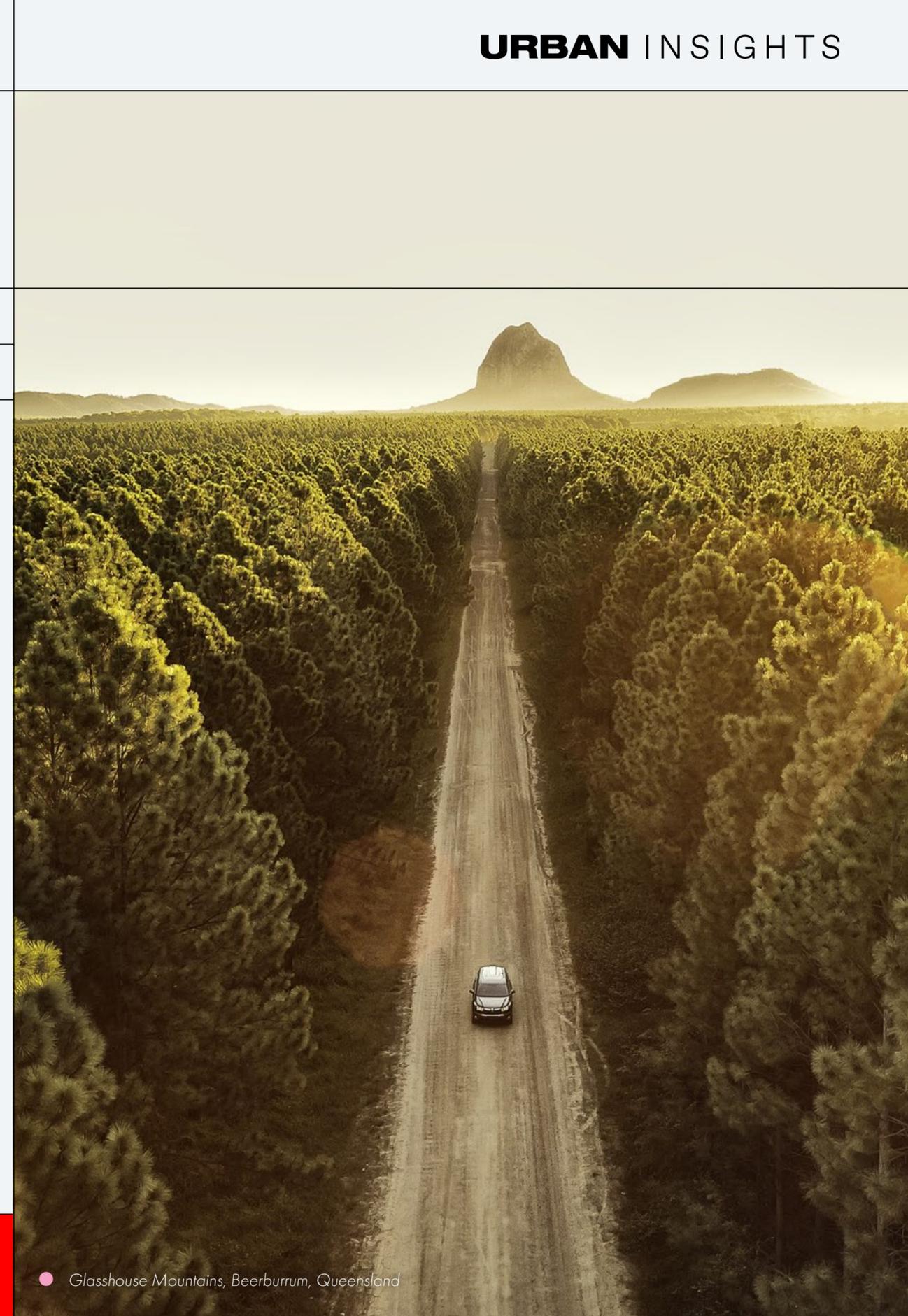
THE VERDICT

WORKING WELL

- Igniting the idea of a trip is highly emotional, not rational. The anticipation and excitement of looking forward to a holiday to escape is where the magic begins.
- We need to give people permission to dream again without the fear or worry as we know dreams have been crushed and people fear disappointment.
- Talk to new dreams, perfect opportunity to dream about new places. We know people have appraised their goals and dreams due to COVID (income change etc.)

WORKING LESS WELL

- The sentiment of supporting the community is important, but it can't activate the market. Duty is appropriate only as an undertone.
- Call to action to 'holiday here this year' feeds into a social norm that holiday abroad is the usual choice. Implying holidaying here is a backup, less desirable choice.



● Glasshouse Mountains, Beerburrum, Queensland

DUTY CAN'T OVERSHADOW THE DREAMING.

02 SEEN VS UNSEEN



● Sydney Harbour Bridge, New South Wales
Image Credits: Destination NSW



HOW DO WE DEFINE THE SPECTRUM?

Australia's animals and landscapes are iconic and immediately recognisable, and have effectively inspired millions of (mostly overseas) travellers to explore our country. The inimitable nature of what we have to offer has been synonymous with once-in-a-lifetime adventuring, ticking things off a travel bucket list.

The challenge is, though, as residents we've seen these

vast landscapes and beaches before. The friendly (cringey?) Aussies and fluffy fauna are familiar. And put together, it feels cliché and one size fits all, rather than geared for a local gaze.

It also feels less relevant to today's travel context which sees people moving away from hot spots and bucket lists and toward the path less travelled. Aspiration is no longer about

capturing the same iconic vantage for your feed; but unleashing a more low-key creativity and finding an angle that's not been seen.

The stereotypes of Australia, and of our cities and states, are appealing enough to international audiences, but too generic to feel motivating to a domestic audience. They need new reasons to go, and reasons to go now.

SEEN ←

→ UNSEEN

- Reliant on stereotypical representations of Australian destinations, animals and culture that are typically used to entice international audiences.

- Broad and generic destinations
- Outback, koalas, kangaroos, stereotypical friendly Aussies, empty vast landscapes, beaches

- Showcasing a new face and representation of what Australian destinations are like in a way that feels nuanced and fresh. Showcasing destinations from new angles, in new ways or highlighting new kinds of experiences and places.

- Unexpected perspectives, nuanced and varied tonality, culturally rich.
- Secret and hidden places to discover (that are also braggable and bring social kudos).

● Aurora Australis, South Arm, Tasmania

“

INTERNATIONALLY, IT'S ENOUGH TO SAY GO SEE DARLING HARBOUR, THE OPERA HOUSE, THE BLUE MOUNTAINS. THAT'S NOT ENOUGH DOMESTICALLY — YOU HAVE TO BE ABLE TO TALK ABOUT WHAT IS GOING TO BE HAPPENING CULTURALLY. WHAT IS THE LATEST EXHIBITION? WHO IS THE CHEF AND WHAT'S THEIR SIGNATURE DISH?

NICOLAS GRONIER, VICE PRESIDENT MARKETING, ACCOR

”

THE STIMULUS

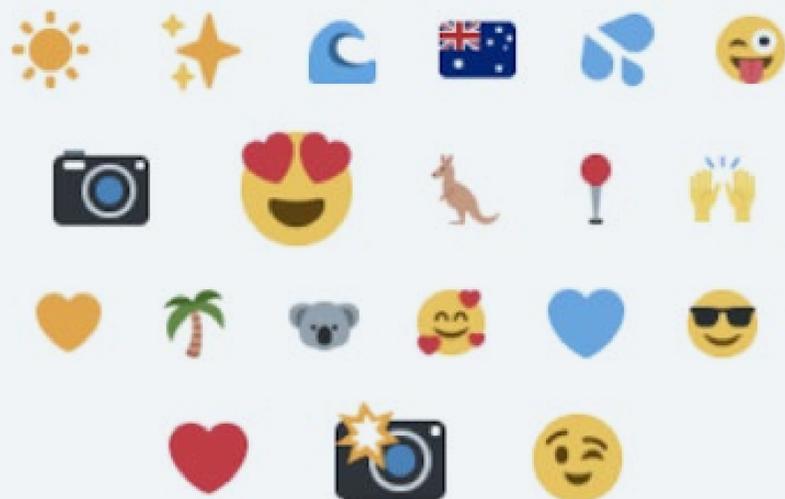
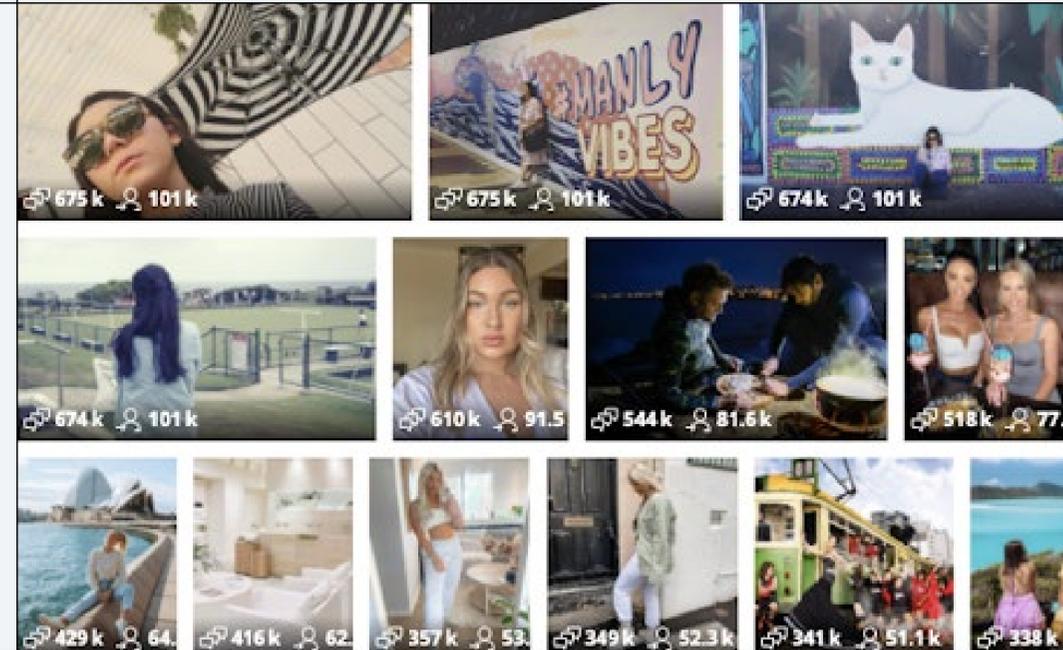
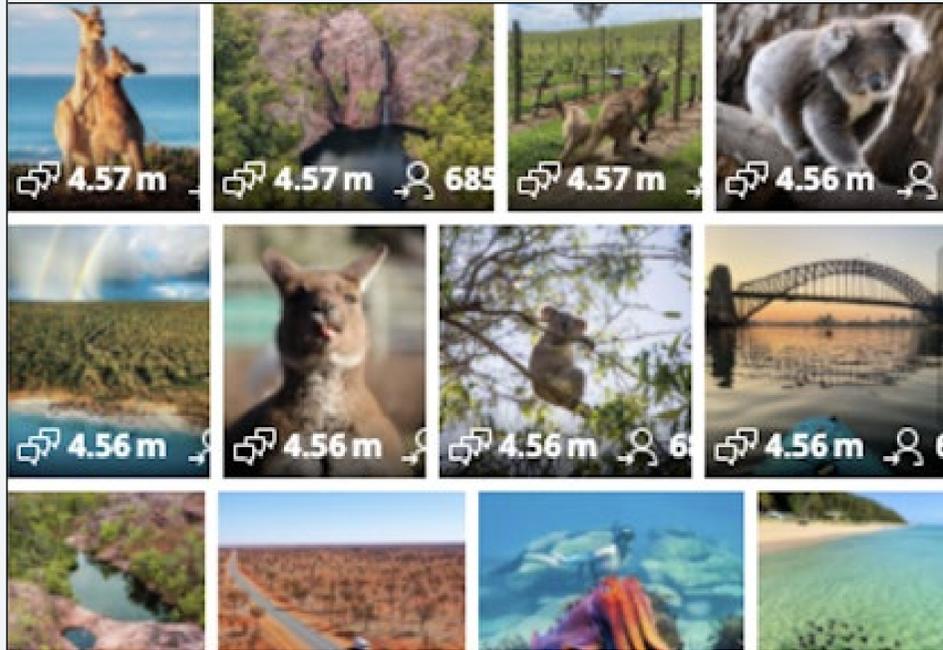
SOCIAL MEDIA ANALYSIS

THE INDUSTRY IS SHOWCASING A VERY DIFFERENT IMAGE OF AUSTRALIAN TRAVEL

THAN THOSE TRAVELLING AUSTRALIA

BUSINESS ACCOUNTS

INDIVIDUAL ACCOUNTS



We analysed a sample of 100,000+ social posts and images to understand how travel conversations and captures have evolved: along with any differentiation in the dialogue between business and consumer accounts.

fauna: consumers are getting much more specific about the culture and experience.

AI revealed that the industry is showcasing a very different image of Australian travel than those travelling within Australia — while industry is leaning heavily on wide angle landscapes and cuddly

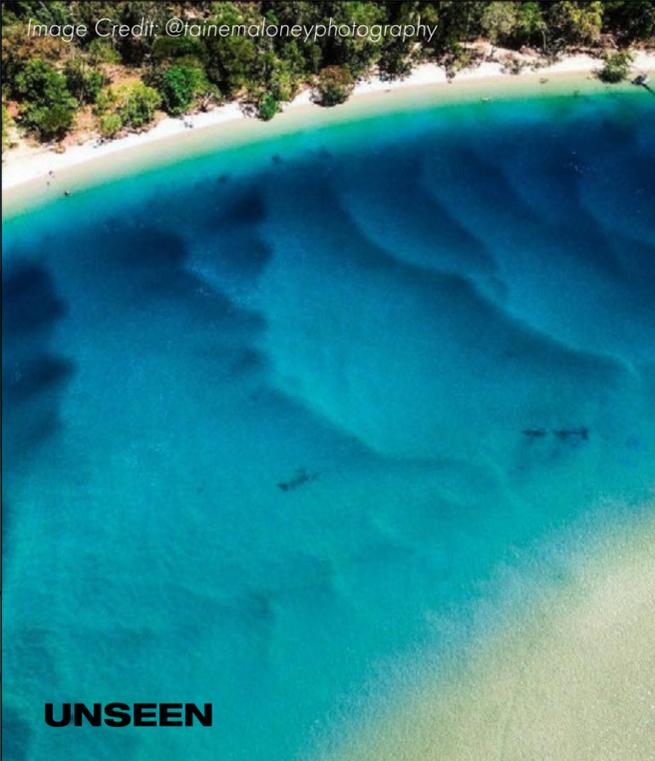
The relative sophistication of the individuals' imagery indicates a bent to "de-larrikinise" brand Australia, showing a much more refined cultural scape.

The personal accounts also steered toward a much more creative, novel and individualistic captures — in contrast to the industry's high production hero shots.

Source: Most engaged Instagram posts from the 100,000+ analysed; 20 August - 20 November 2020

THE STIMULUS

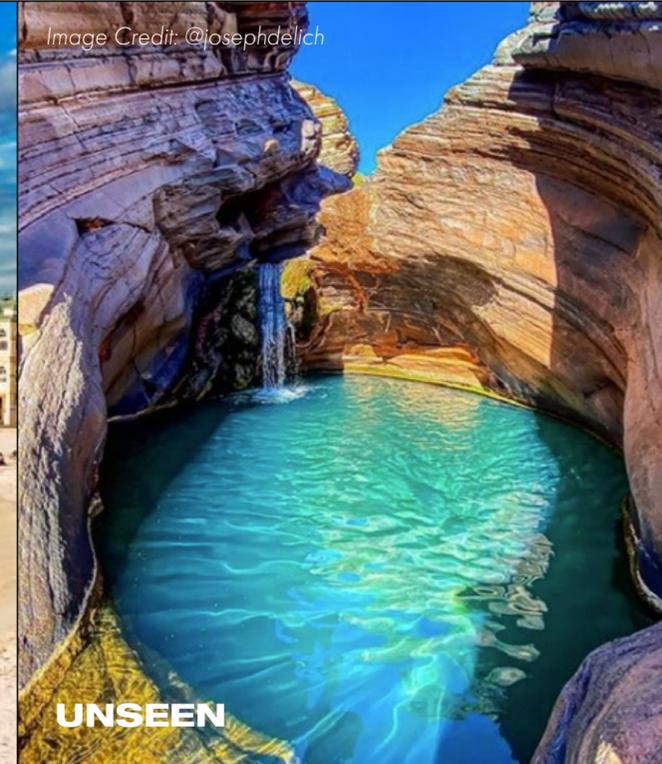
CAMPAIGN CREATIVE

	NOOSA		SOUTH AUSTRALIA	
	<p>Image Credit: Tourism Australia</p>  <p>SEEN</p>	<p>Image Credit: @ainemaloneyphotography</p>  <p>UNSEEN</p>	<p>Image Credit: @mpiovesanphoto</p>  <p>SEEN</p>	<p>Image Credit: @y.lin.photography</p>  <p>UNSEEN</p>
EYE-CATCHING	27%	87%	56%	80%
WANT TO VISIT	32%	83%	62%	60%
MEMORABLE	15%	65%	34%	62%
WANT TO SHARE IT	22%	59%	41%	43% →

ANIMALS



PERTH



EYE-CATCHING	57%
WANT TO VISIT	45%
MEMORABLE	49%
WANT TO SHARE IT	43%

57%	83%
45%	74%
49%	71%
43%	59%

83%	98%
74%	95%
71%	90%
59%	76%

60%	63%
41%	44%

98%	95%
90%	76%

■ All "unseen" stimulus outperformed their "seen" counterparts, particularly with regard to the extent to which imagery was eye-catching and made the audience want to visit the place.

The most successful content showed an unusual or unique vantage — sharing a perspective we're unlikely to have seen before, even if we know the destination well (like Noosa) — ultimately, fuelling a desire to know and see more.



THE VERDICT

WORKING WELL

- **Create Intrigue.** The most successful content shows unusual sights, things you don't see every day, creating intrigue and curiosity to find out more.
- **Show the unexpected** of the familiar.
- **Dial up going off the beaten track:** Cities and known tourist spots come with the negative associations of crowds that are less appealing now and during a pandemic.
- **Celebrating the small businesses and individuals** not just the big sites audiences are used to seeing and gives them tangible people and places to connect with you don't see every day, creating intrigue and curiosity to find out more.

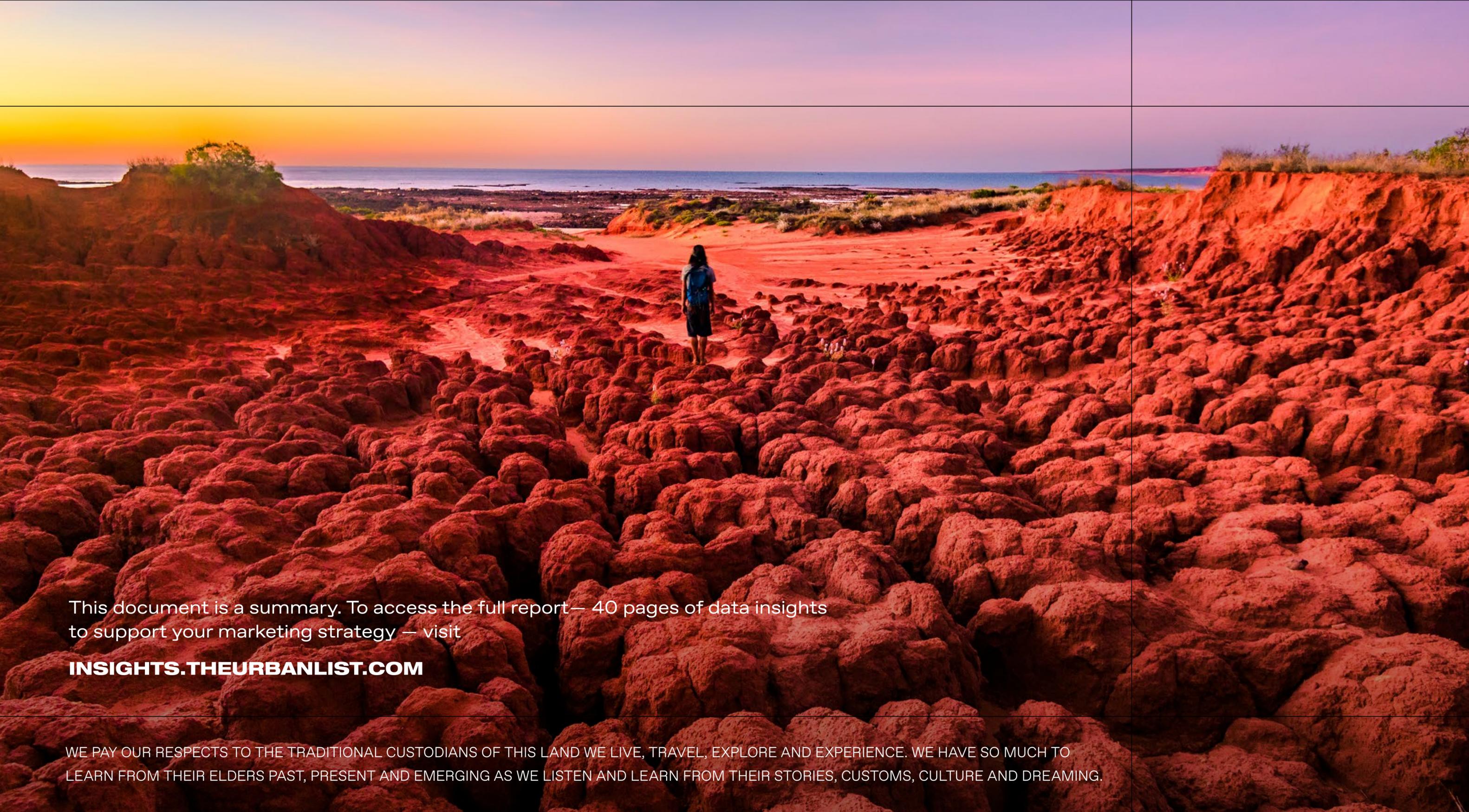
WORKING LESS WELL

- The domestic audiences so **overly familiar with these scenes** they don't feel compelled to discover.
- They feel these icons will always be there.. They need new reasons to go, and reasons to go now e.g. events/openings/sport games.
- Stereotypical Australian imagery feels targeted towards an international audience **rather than showing understanding and empathy** to cater to domestic audiences' needs.

**LEAN IN TO THE INTIMACY OF DISCOVERY
(AND DITCH THE SOCIAL SAME-NESS)**



● Shark Bay, Western Australia



This document is a summary. To access the full report— 40 pages of data insights to support your marketing strategy — visit

[INSIGHTS.THEURBANLIST.COM](https://insights.theurbanlist.com)

WE PAY OUR RESPECTS TO THE TRADITIONAL CUSTODIANS OF THIS LAND WE LIVE, TRAVEL, EXPLORE AND EXPERIENCE. WE HAVE SO MUCH TO LEARN FROM THEIR ELDERS PAST, PRESENT AND EMERGING AS WE LISTEN AND LEARN FROM THEIR STORIES, CUSTOMS, CULTURE AND DREAMING.