

Consumer Demand Project 2019 United Kingdom Market Fact Sheet



Current UK Visitation and Expenditure in Australia¹

Australia welcomed 670,000 visitors from the UK in the year ending September 2019 down 4.3 per cent year-on-year. These visitors stayed 20.8m nights in Australia. During the same period, visitors from the UK spent \$1.8b in Australia.



\$1.8b spend
-4.7% year-on-year



670,000 visitors
-4.3% year-on-year



20.8m nights
-7.4% year-on-year

Factors of importance when choosing holiday destination

Safety and security and natural beauty and wildlife are the two most important factors for UK travellers. They value friendliness and local hospitality more than travellers in other markets.

Top five importance factors

% ranking each factor in their top five most important



A safe and secure destination **52%**
(54%)



World-class natural beauty and wildlife **43%**
(49%)



A destination that offers value for money **41%**
(39%)



Friendly and open citizens, local hospitality **37%**
(32%)



Good food, wine, local cuisine/produce **36%**
(35%)

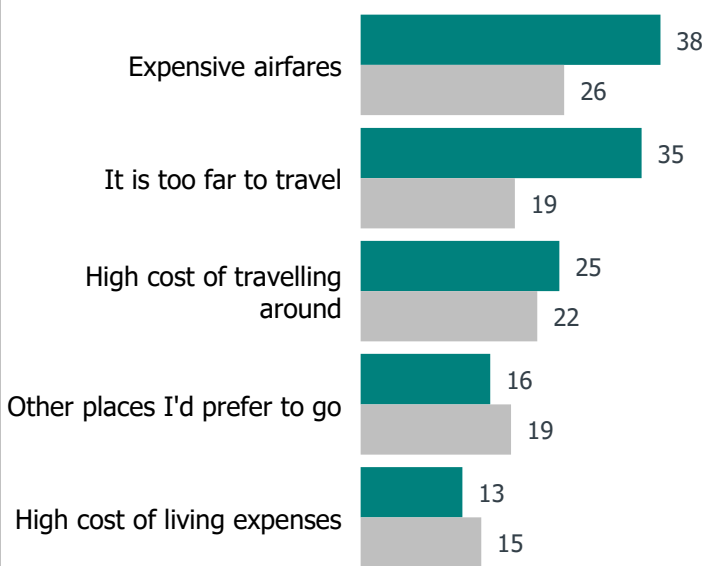
% UK travellers (%) 11 Market total²

Barriers to visiting Australia

UK travellers are almost twice as likely as travellers in other markets to cite distance as a reason for not visiting Australia. Cost of airfares was also a significant barrier for UK travellers.

Top five barriers to visiting Australia

% of those not intending to visit Australia



■ UK travellers ■ 11 Market total²

Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

Consumer Demand Project 2019 United Kingdom Market Fact Sheet



Current UK Visitation and Expenditure in Queensland¹

The UK delivered 216,000 visitors to Queensland during the year ending September 2019, down 8.1 per cent compared to the previous year. Over the same time period, Overnight Visitor Expenditure (OVE) decreased 8.9 per cent to \$382.7m.



\$382.7m spend
-8.9% year-on-year



216,000 visitors
-8.1% year-on-year



4.6m nights
-12.8% year-on-year

Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, UK travellers ranked Queensland second for consideration, experience awareness and intention. It was also the second most visited state in the year ending December 2018.

Queensland's competitive rankings³

ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) ⁴	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

■ 2018 rank ■ 2019 rank

How to read this:
UK travellers rank Queensland 2nd out of Australian states and territories for consideration

Australia's competitive rankings - UK market

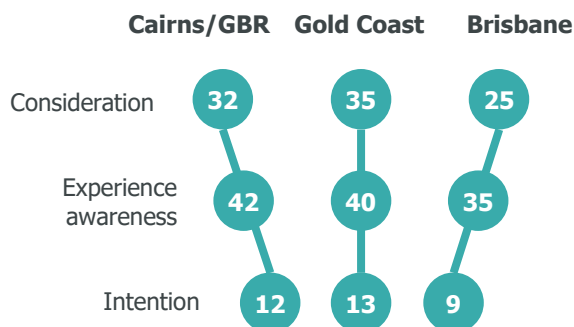
ranking against other international destinations



How to read this: Australia comes 2nd in the list of destinations UK travellers intend to visit, but ranks 5th in terms of actual visitation

Queensland destinations - UK market

% of travellers considering Australia



How to read this: 35% of UK travellers considering visiting Australia have considered visiting the Gold Coast, but only 13% intend to actually visit

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)
³ INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany
⁴ Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

Consumer Demand Project 2019 United Kingdom Market Fact Sheet



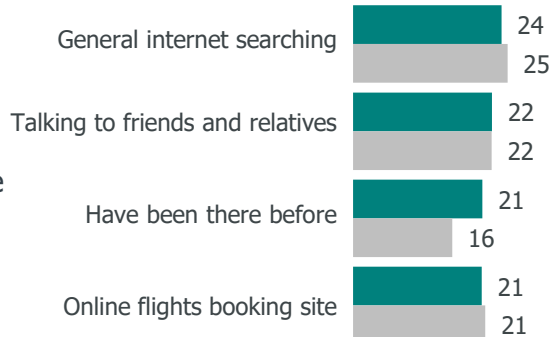
Sources for travel planning

When it comes to booking flights, tours and accommodation UK consumers are less likely to book through travel website and apps compared to other markets.

In addition to general internet searching, UK travellers are inspired by talking to friends and relatives and by their own prior trips.

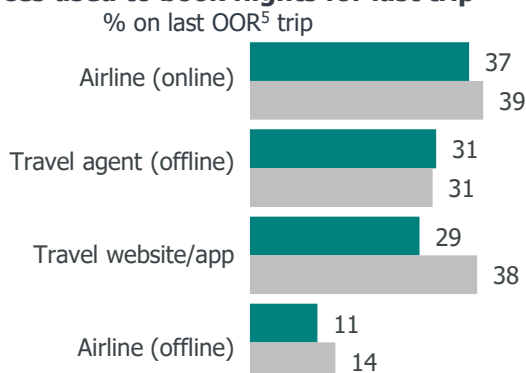
Sources of inspiration for last trip

% on last OOR⁵ trip



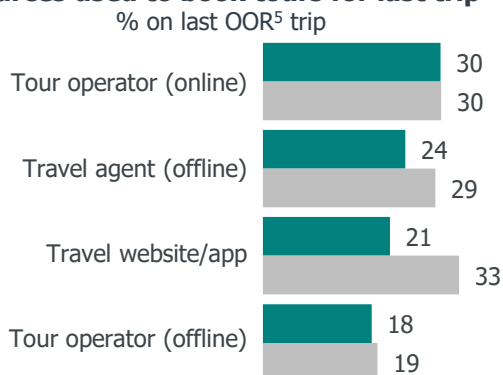
Sources used to book flights for last trip

% on last OOR⁵ trip



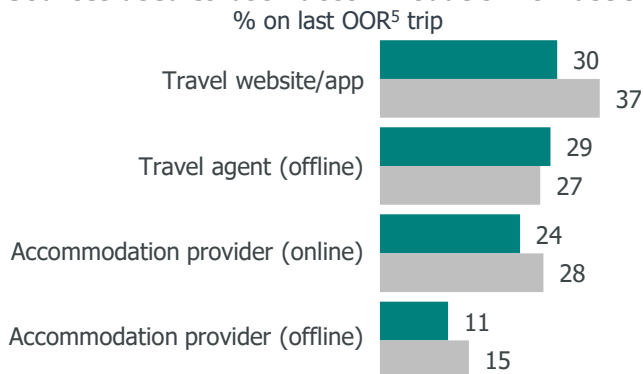
Sources used to book tours for last trip

% on last OOR⁵ trip



Sources used to book accommodation for last trip

% on last OOR⁵ trip



■ UK travellers

■ 11 Market total²



² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

⁵ OOR Trip – Out of Region Trip (UK Travellers travelling outside Europe, United Arab Emirates, or North Africa)