

WHEN 2.5 MILLION
MILLENNIALS CHOSE
TASMANIA...

THE
URBAN
LIST

SUSANNAH GEORGE
FOUNDER & CEO

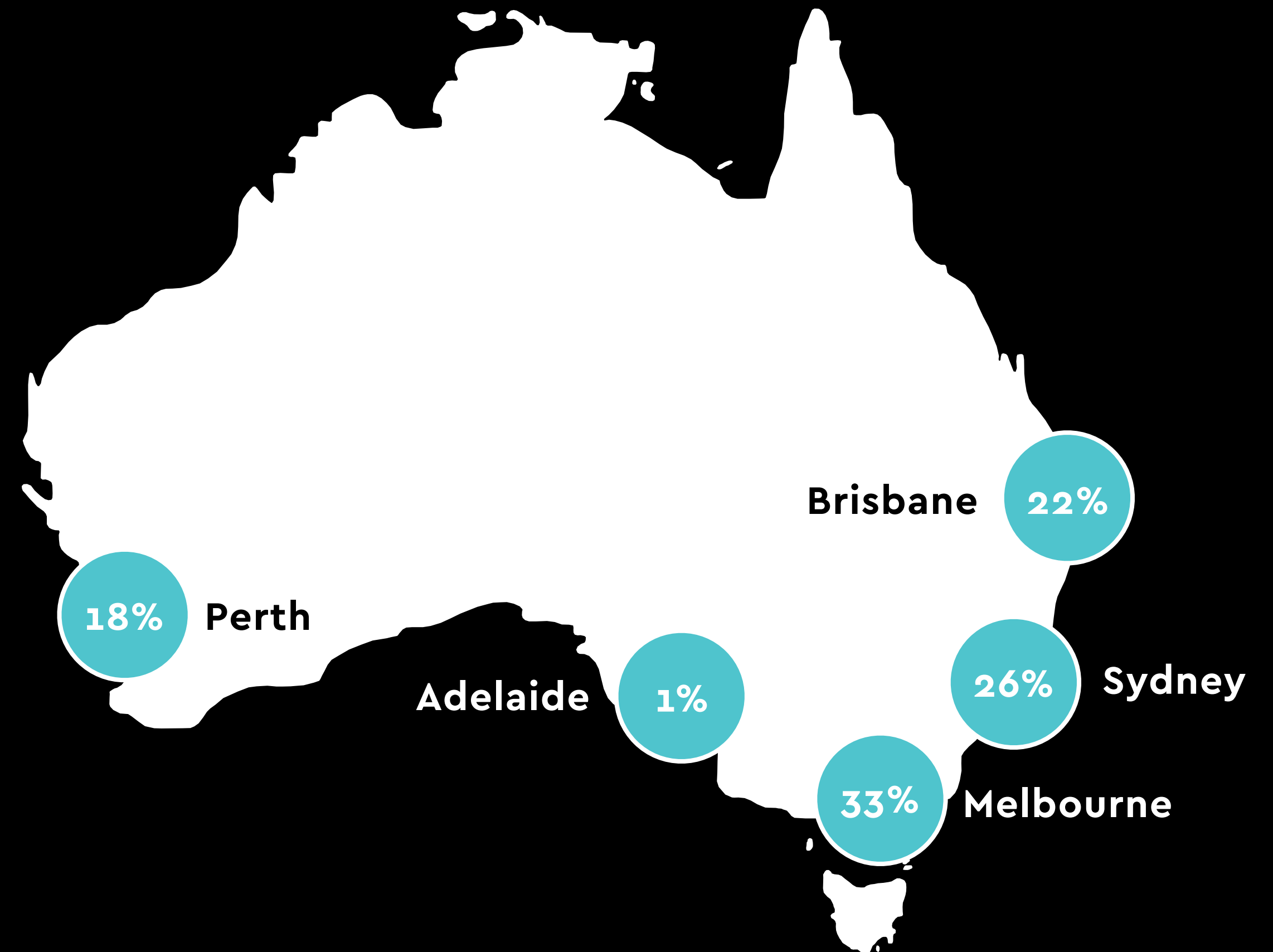
IN NOVEMBER 2016, WE CONDUCTED A PIECE OF RESEARCH...

Australia's Biggest Millennial Travel Survey

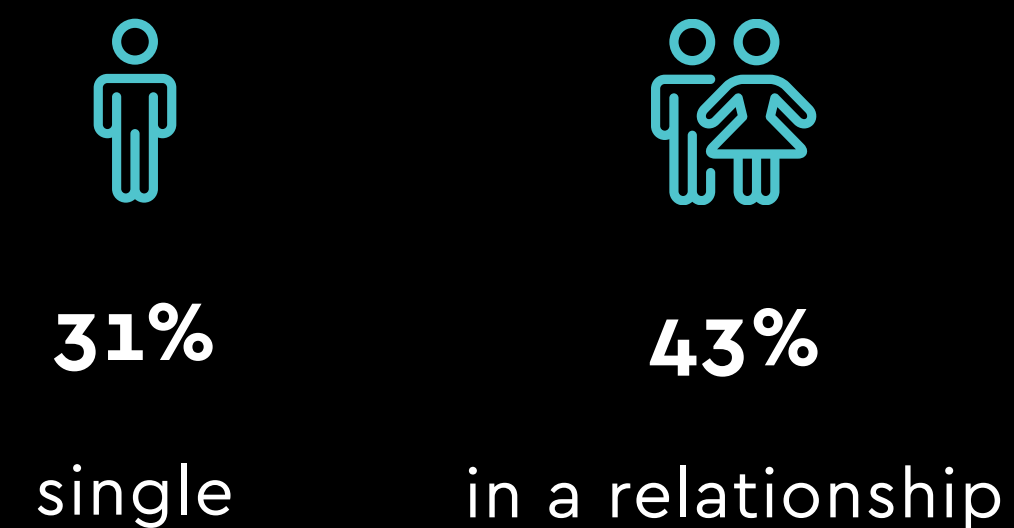
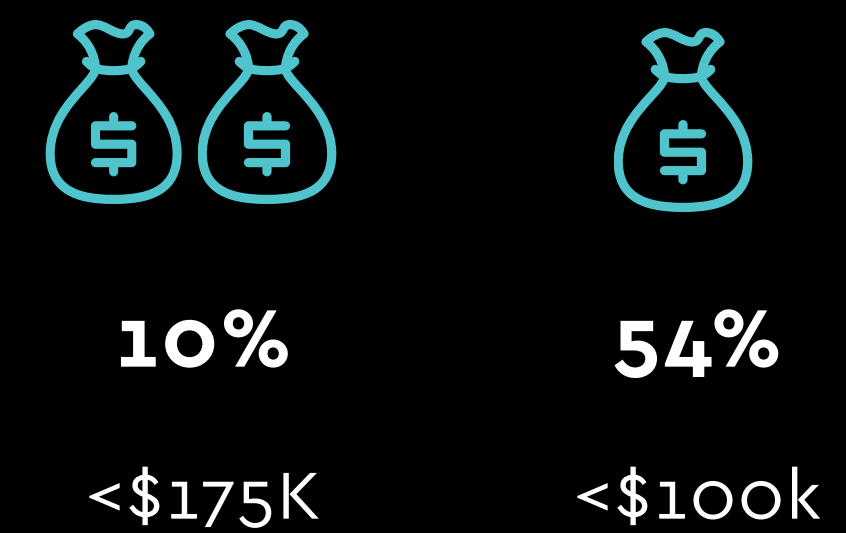
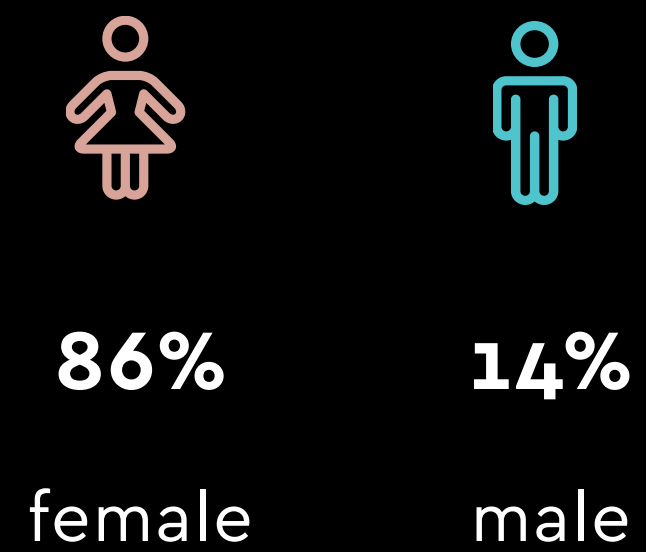
14,000+ survey respondents.

45+ questions.

All major cities represented.



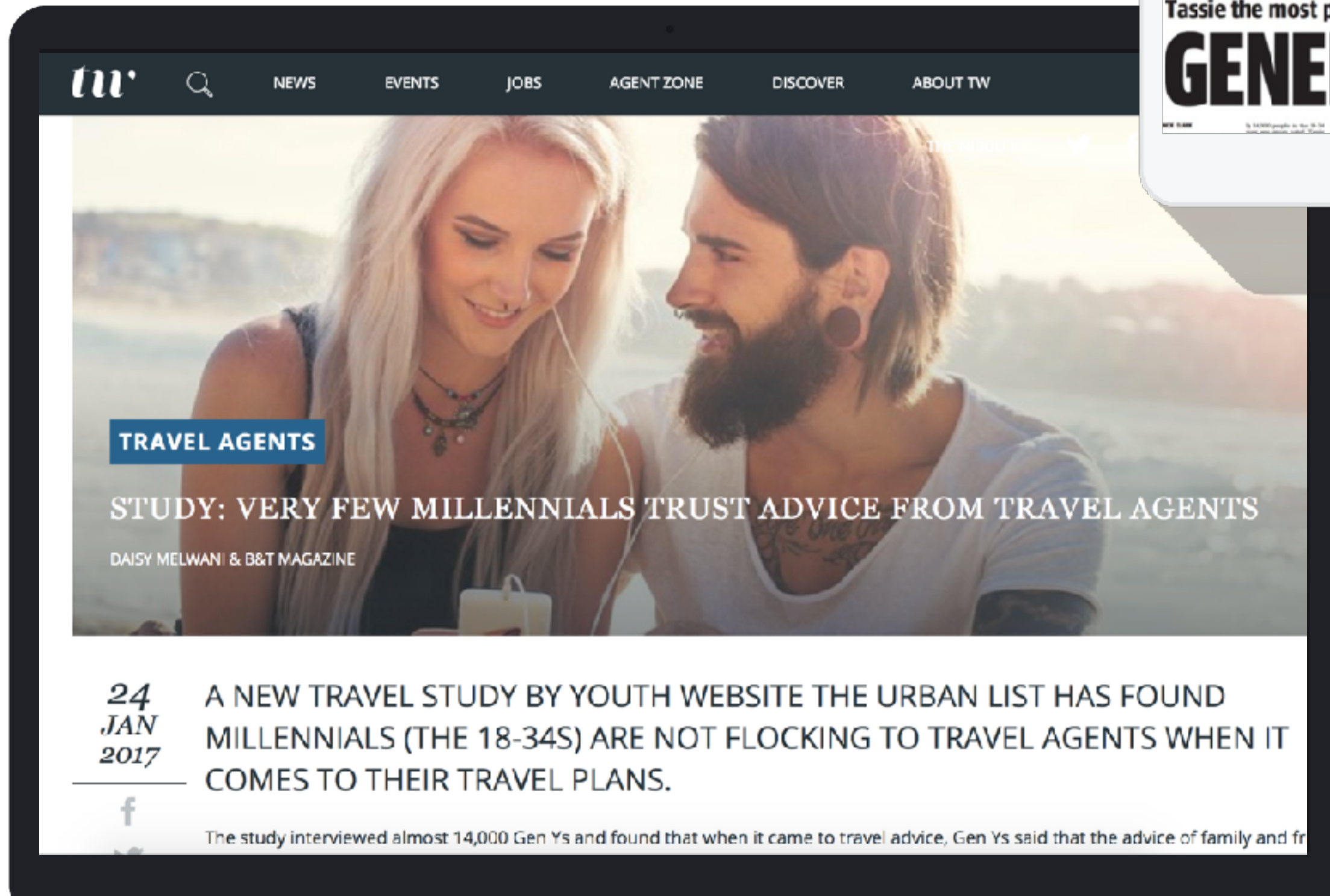
What The Respondents Look Like...



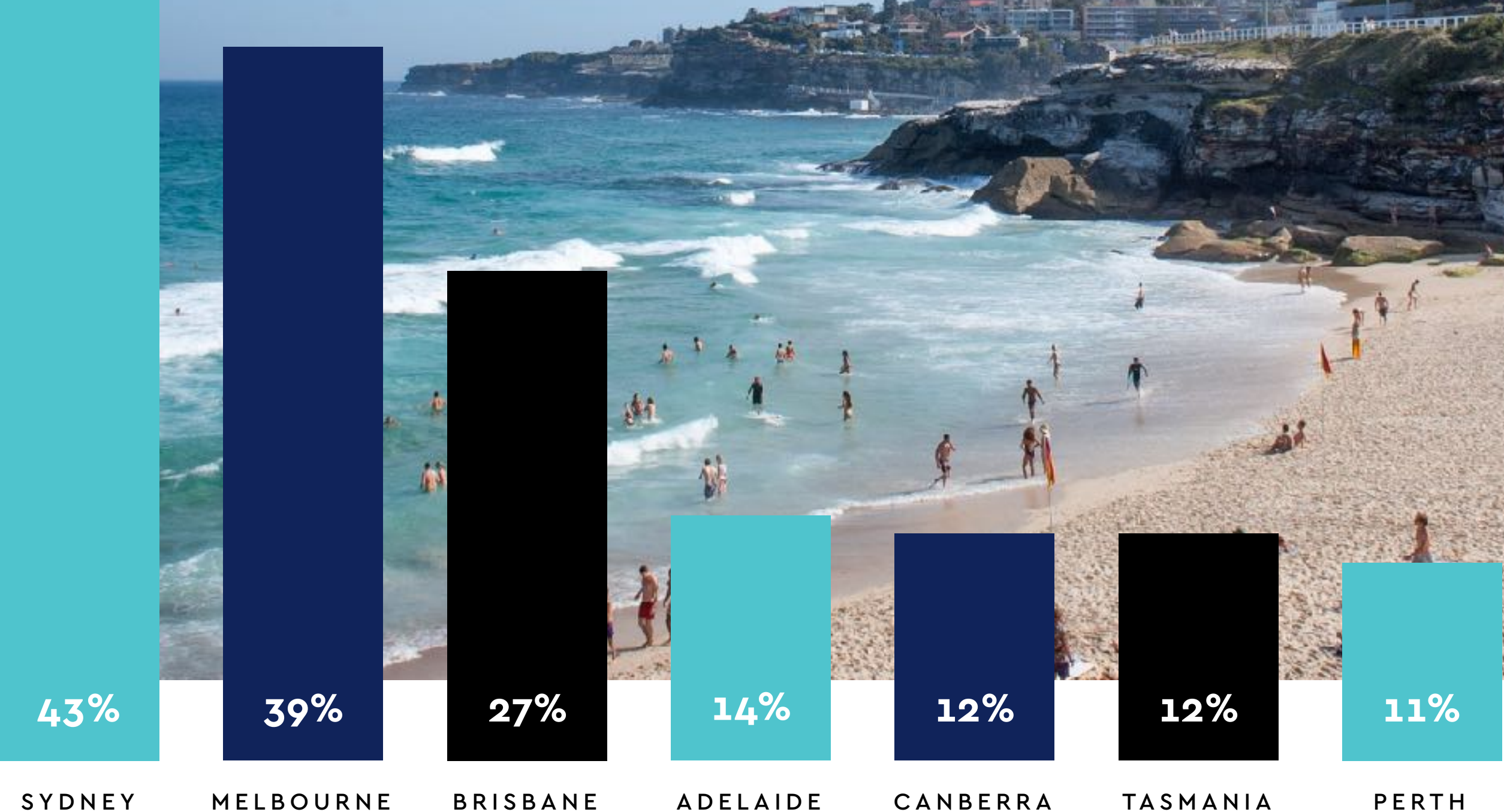


TASMANIA WAS NAMED THE MOST DESIRED DOMESTIC TRAVEL DESTINATION BY MILLENNIALS
- THEIR #1 PLACE TO TRAVEL TO.

#TASMANIABAE



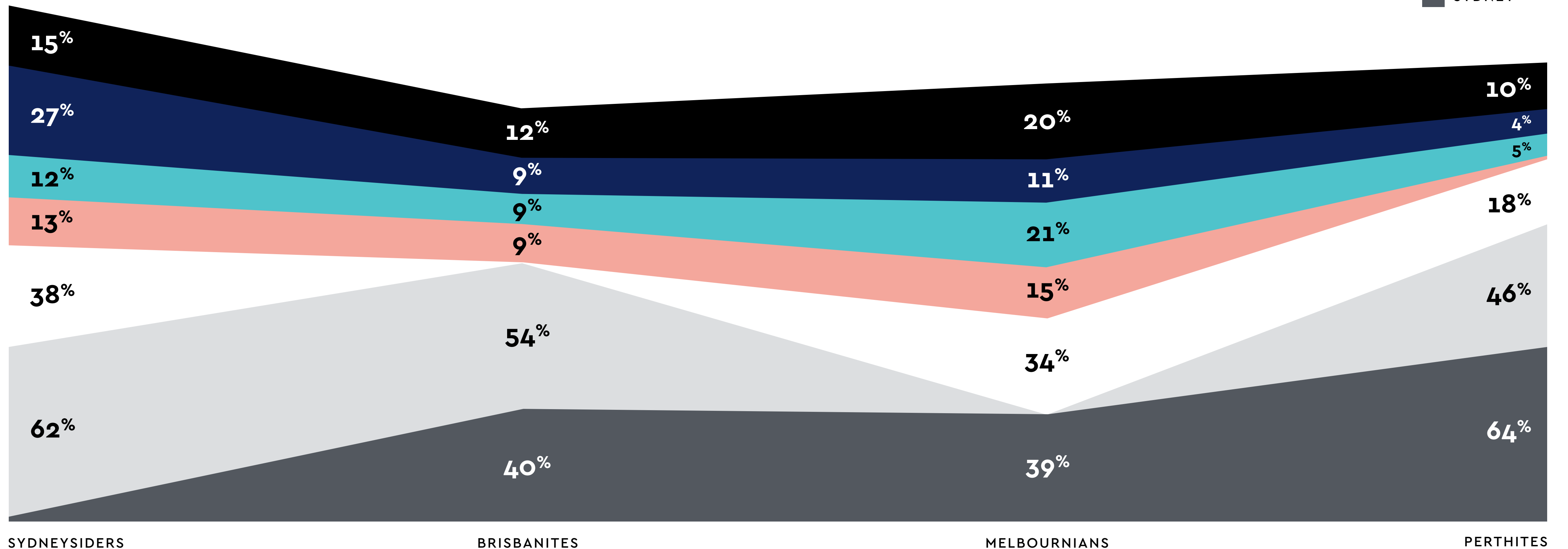
The Most Visited Cities in Australia in 2016



**The percentage of respondents that visited capital cities (selections excluded their home city).*

Who's Heading Where?

Sydneysiders flock to Melbourne, but Melbournians don't return the favour to the same degree. They are equally as likely to visit Sydney or Brisbane, and are regular visitors to Tasmania and Adelaide. Perthites are more likely to go to Sydney than Melbourne.



The Most Desirable Places to Visit in Australia.

Tasmania is **THE** place to visit. Next comes Melbourne, Uluru, The Gold Coast and Broome.



The Millennial Customer Journey

Our research demonstrated that although millennials are a generation obsessed with travel and experiences, no one is successfully meeting their needs in delivering the **right information** at the **right time**, or in the **right way for them**.

This document provides brands with data and insights to help seize this opportunity—winning the hearts and purchase power of millennials in the travel sector.



A woman with dark hair is floating on her back in a swimming pool. Her eyes are closed, and she has a peaceful, serene expression. The water is a vibrant blue-green color with ripples and reflections of light. The overall mood is calm and dreamlike.

WANDERLUSTING

HOW TO ENGAGE MILLENNIALS DURING THE DREAMING STAGE

Key Insights

- They want to 'discover' a brand, experience, or place.
- They want to feel like it's unique and they 'found it first'.
- They don't know where they're headed, but they know what kind of experience they want when they get there:
 - Somewhere with **culture**
 - Somewhere **relaxing**
 - Great **scenery**
 - Incredible **food**
- They are most inspired by beautiful visuals, and respond to content that leaves them 'wanting more' and able to craft their own unique itinerary.
- They don't want information overload until they're ready to plan.



The Opportunity To Influence
At This Stage Is Significant

Only

62%

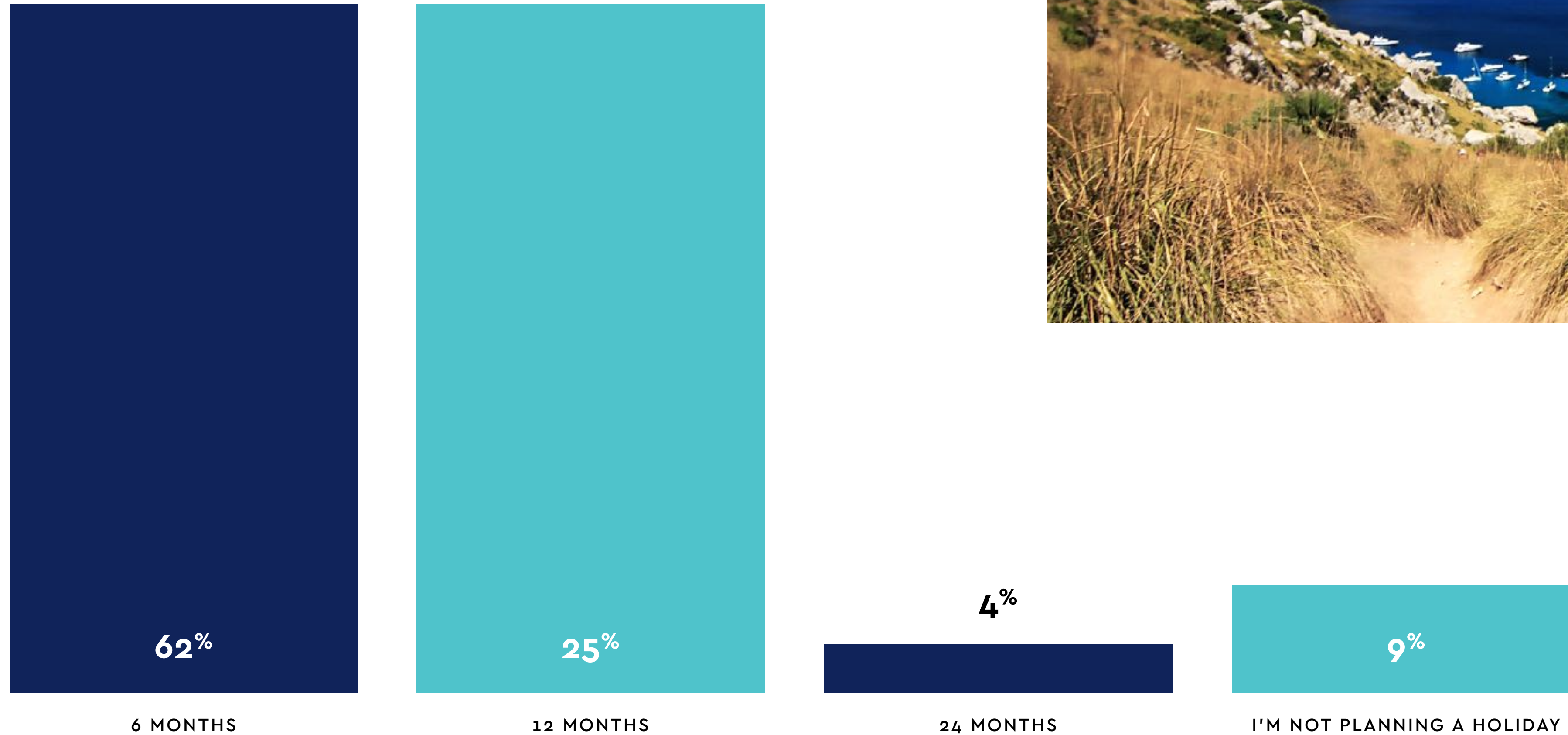
1/3

Are planning a holiday in the next 6 months.

Have a specific destination in mind.

When is Their Next Trip?

The majority of Urban List readers will be going on holiday in the next 6 months (for business and/or leisure).





90%

travel internationally
once per year.



Spend 20 days
overseas



Avg. 3
domestic
trips/year



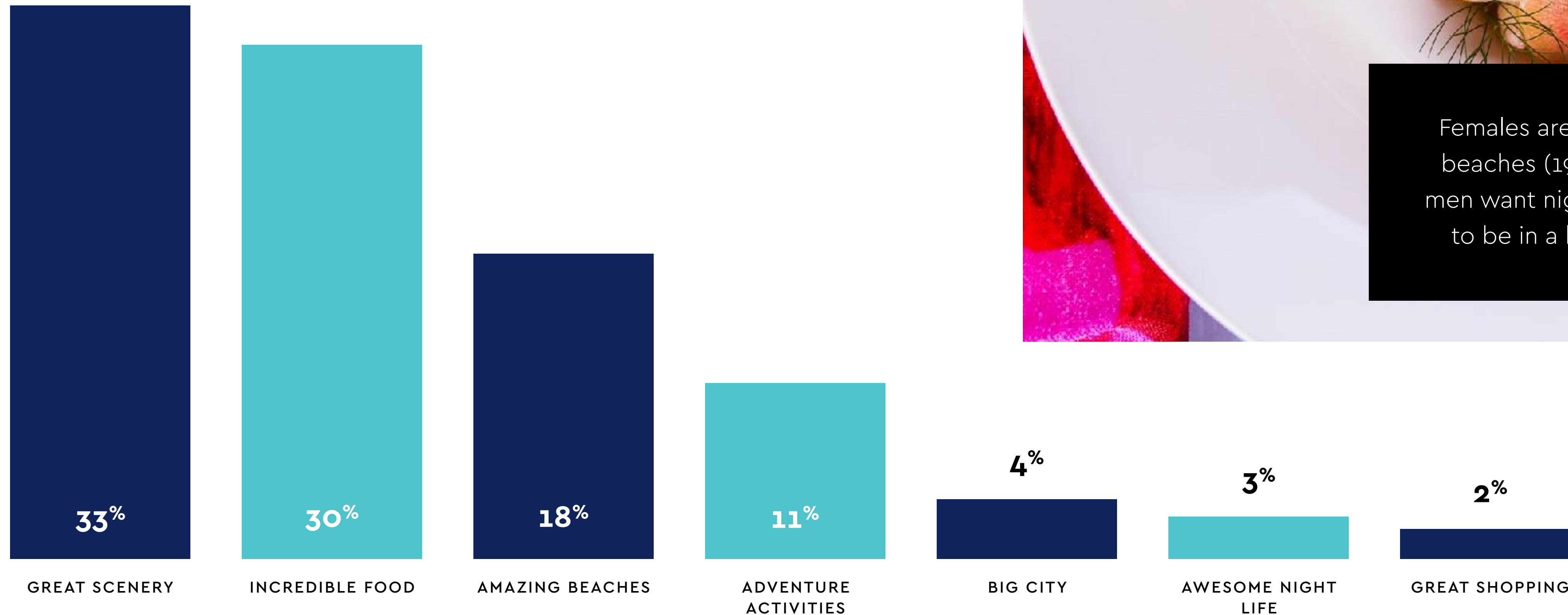
25% do 5+
domestic
trips / year



98%
Travel domestically
once per year.

What is Most Important When Choosing a Holiday Destination?

Your native strengths are what they want in a holiday.



Females are more likely to want beaches (19% vs 14%), whereas men want nightlife (6% vs 2%) and to be in a big city (6% vs 3%).



PLANNING THE DREAM

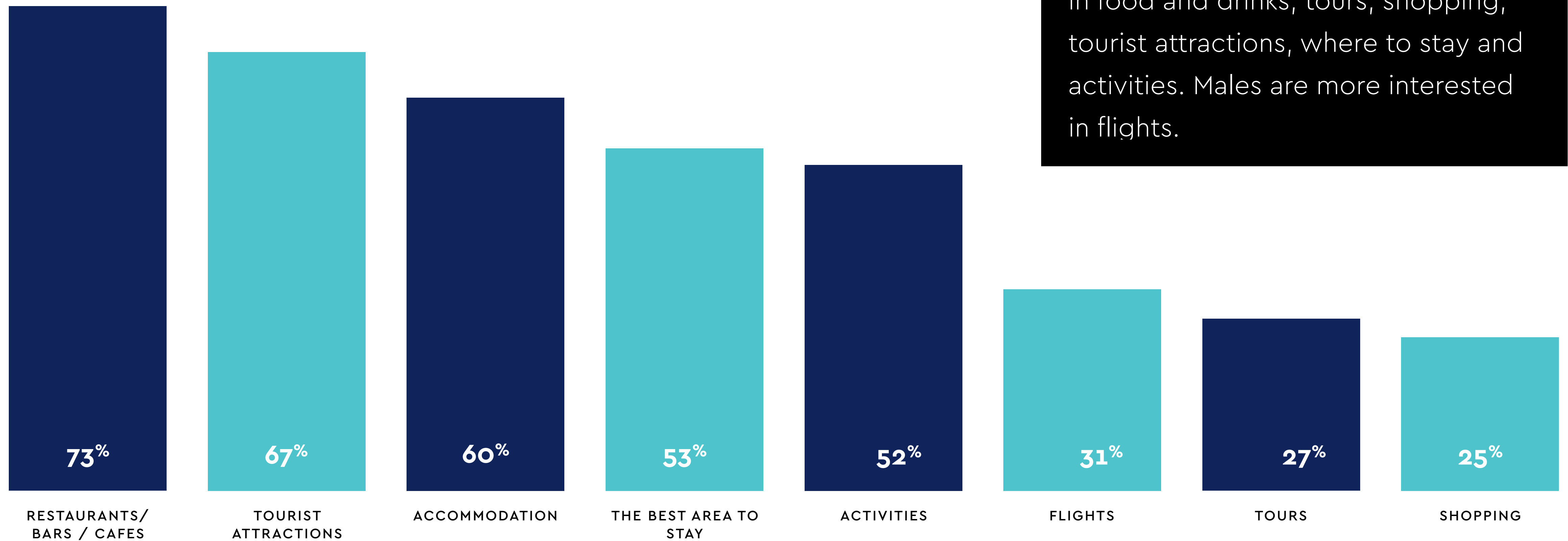
HOW TO MAINTAIN MILLENNIAL'S ATTENTION AND BUILD THEIR
TRUST THROUGH THE PLANNING PHASE

Key Insights

- Millennials want to customise their own travel journey and experiences, They want all the options/information that enables them to create their own 'unique' path.
- Give them information about:
 - Coolest places to **eat and drink** in different neighbourhoods
 - Local/insider tips on cool places or **events**
 - Cool and unique **experiences** (off the beaten track or things the locals do)
 - The best accommodation options in each **location** (not the biggest or best known)
 - The essentials like weather, currency, when to go, etc.
 - Best **shopping** (but nothing touristy, thanks!)

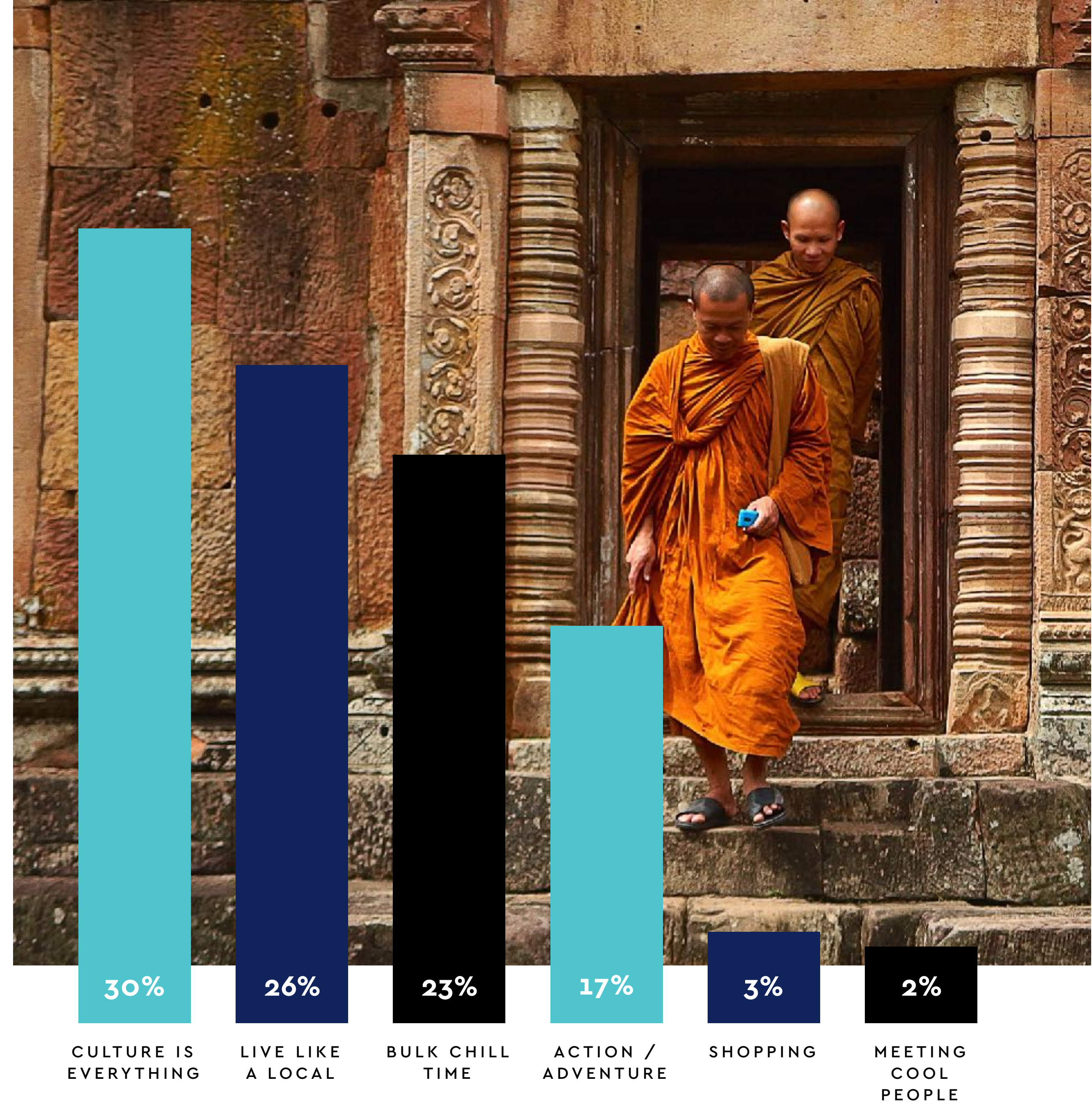


When Researching, Which Subjects Are You Most Interested In?



Females are slightly more interested in food and drinks, tours, shopping, tourist attractions, where to stay and activities. Males are more interested in flights.

How Would You Describe Your Holiday Style?



What's Most Important to You From a Travel Research Source?

THE INFORMATION IS RELEVANT TO ME
AND HOW I LIKE TO TRAVEL

36%

THE RECOMMENDATIONS ARE
TRUSTWORTHY

33%

VARIETY OF CONTENT AND OPTIONS

11%

ABILITY TO PLAN AND BOOK THROUGH
THE SAME WEBSITE

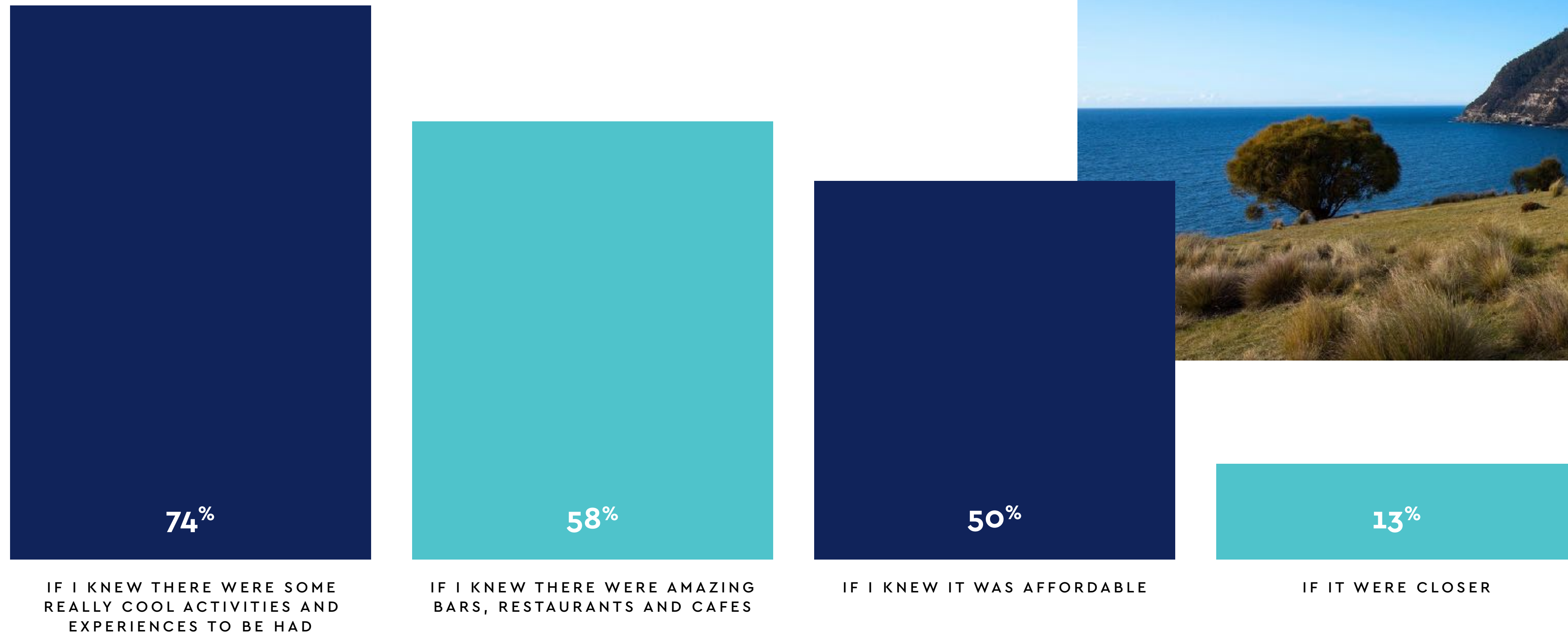
11%

EVERYTHING FOR EACH LOCATION IS ON
ONE PAGE / SECTION

11%



What would make you more likely to visit Tasmania?



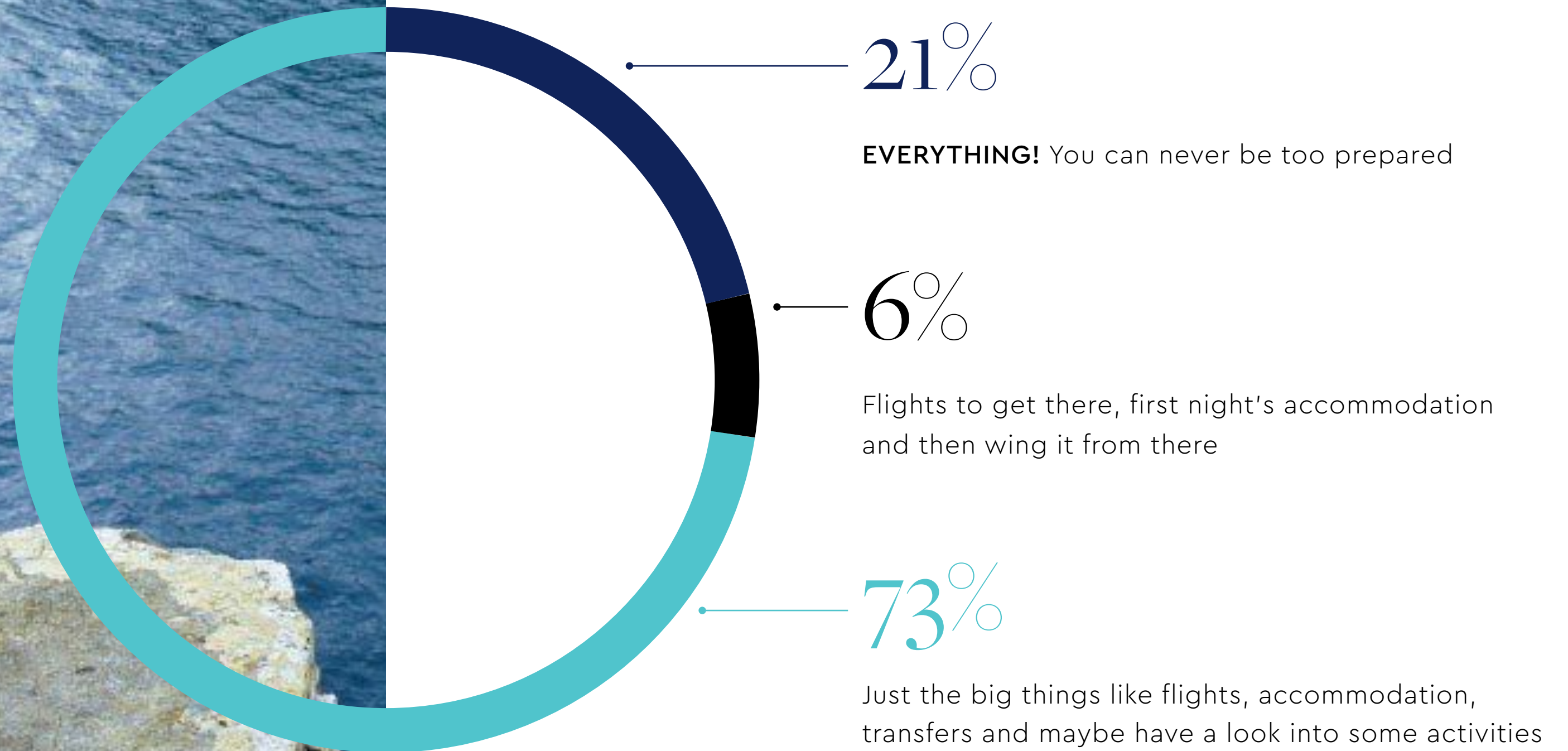
A person wearing a dark long-sleeved shirt, shorts, and a dark baseball cap is sitting on a rocky ledge, looking out over a vast blue ocean. In the distance, a large, craggy island rises from the water. The scene is captured in soft, natural light, likely during the golden hour. The text 'LET'S DO THIS' is overlaid in large, white, sans-serif capital letters across the middle of the image.

LET'S DO THIS

HOW TO BE THERE & BE TRUSTED WHEN MILLENNIALS WANT TO BOOK



How much do you book in advance?



Key Insights

- Only 1 in 5 millennials plan their full itinerary before they arrive at their destination.
- – Millennials' preference for unique experiences and boutique brands is also reflected in the hotels they choose, 54% saying they'd prefer a boutique hotel.



Influencing 'Let's-do-This' Moments: Flights.

- **56%** book their flights **direct**
- **44%** go through an aggregator or **travel agent** with Skyscanner the most popular (ahead of Webjet)
- **Cost is the most important factor**, even though they're booking direct
- Only **1 in 3** are a member of a frequent flyer program – Qantas is most popular
- **Cash and credit are used equally** when paying for travel expenses





Influencing 'Let's-do-this' moments: Accommodation.

- **23%** book direct with the hotel
- **20%** book with AirBnB
- Aggregators are still winning out but no player is the most dominant. Expedia, Wotif, Hotels.com and Trip Advisor are used by **41%** of millennials (ave 10.5% each).
- When choosing the style of accommodation **boutique hotels are most popular, claiming 54%**
- **Airbnb** is on the rise, with 40% of millennials preferring to stay in this style of accom

A woman with long dark hair, wearing a white wide-brimmed hat and a white short-sleeved dress, is sitting on a rocky ledge. She is looking out over a vast, rugged landscape of light-colored, porous rock formations. In the distance, a deep blue ocean is visible. The scene is brightly lit, suggesting a sunny day.

LIVING THE DREAM

HOW TO BE THERE, BE RELEVANT, AND BE TRUSTED WHEN MILLENNIALS ARE
ACTUALLY ON THE GROUND EXPERIENCING THEIR CHOSEN DESTINATION

Key Insights

- Again, only 1 in 5 millennials plan their full itinerary before they arrive at their destination, which means the opportunity to be there and be valuable when they're on the ground 'experiencing' is significant.
- Millennials are also frustrated at having to spend 'too much time Googling' when they're travelling, further proving that no one is sufficiently meeting their needs.
- **Whilst tips from friends and family trumps the list of trusted recommendation sources, online articles is a clear second.**





ONLY 1 IN 5 PLAN EVERYTHING

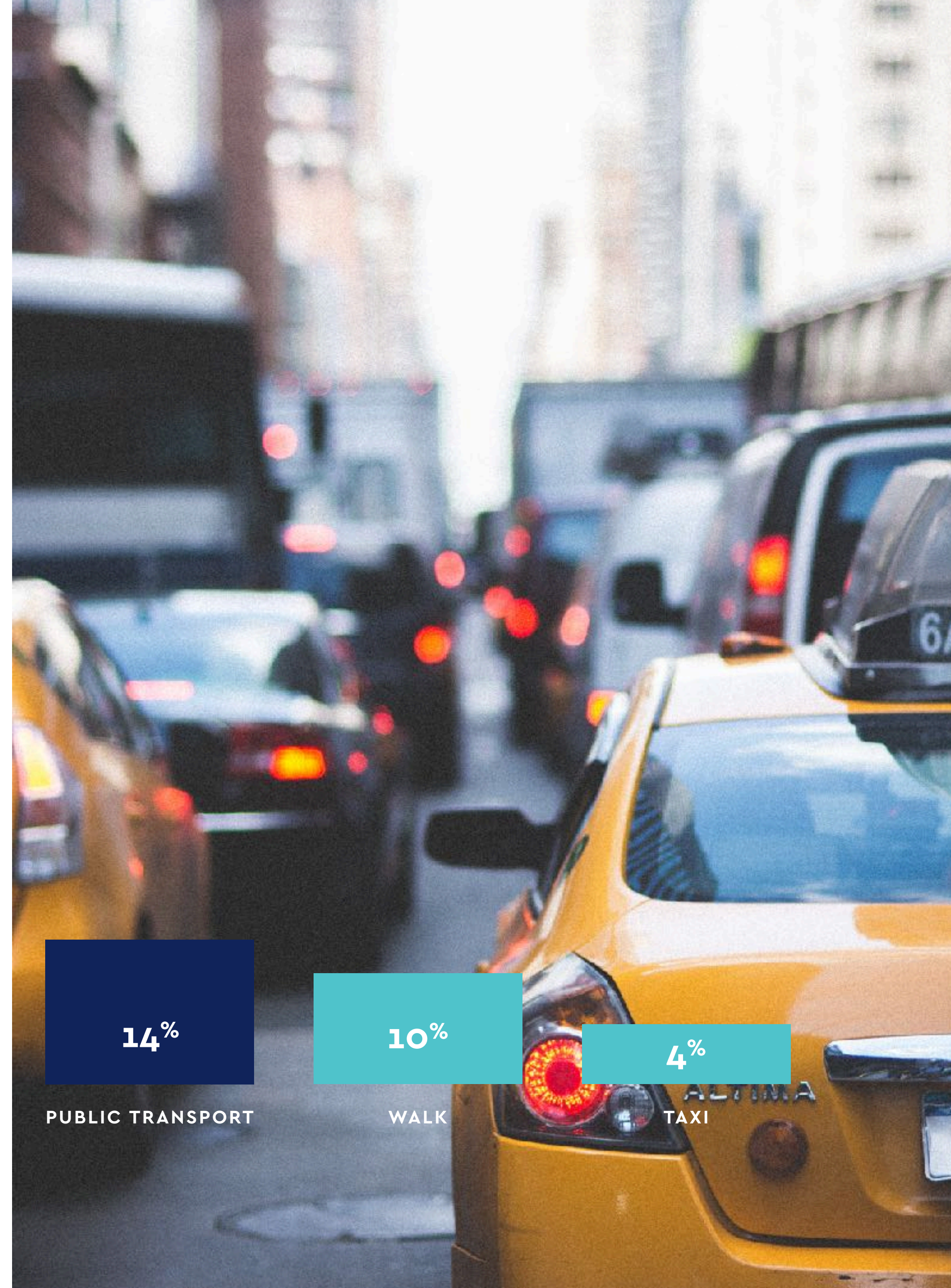
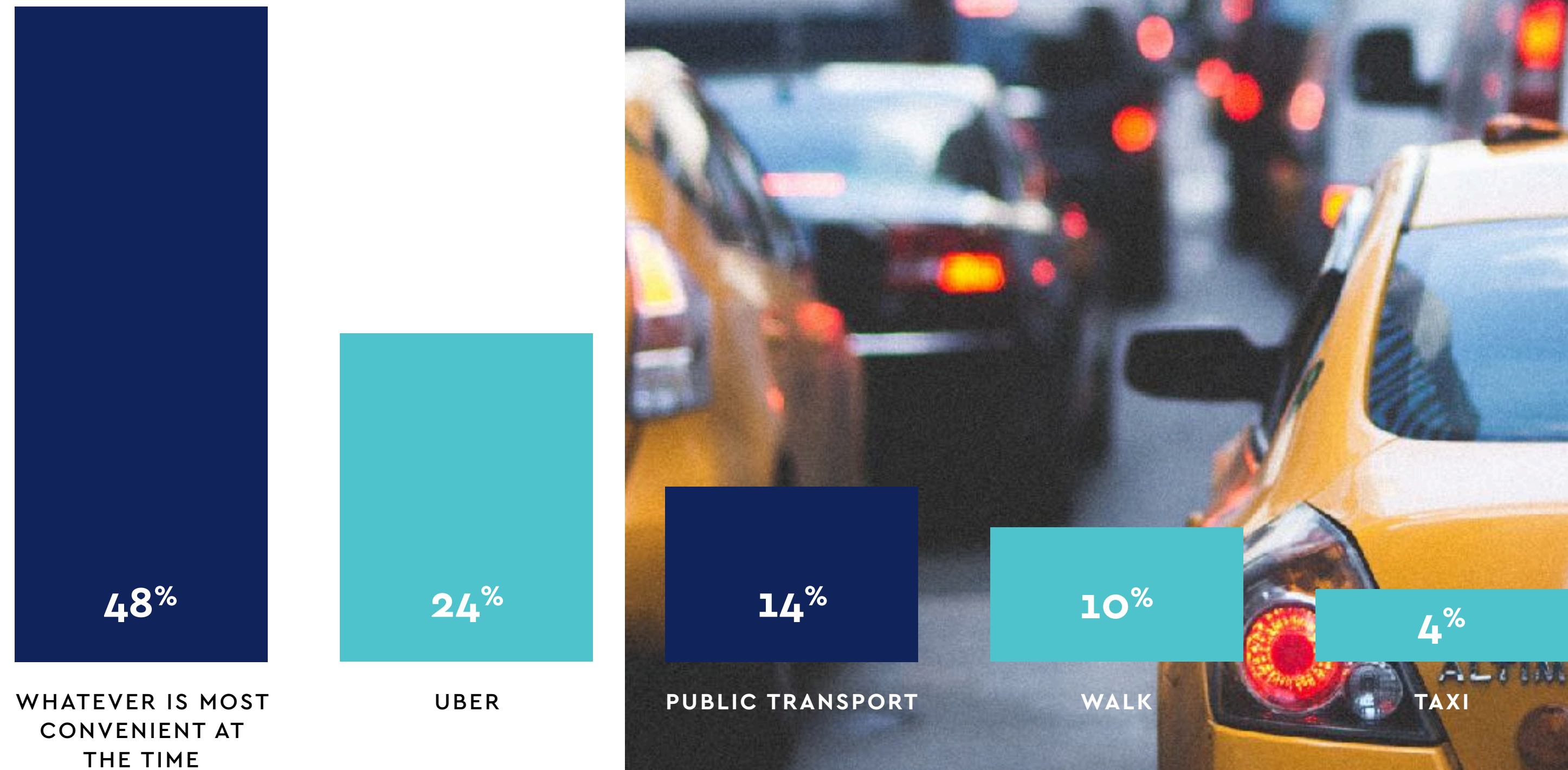
SOURCE: THE URBAN LIST MILLENNIAL TRUST RESEARCH 2016

Aside from accommodation, here's what they're spending on...



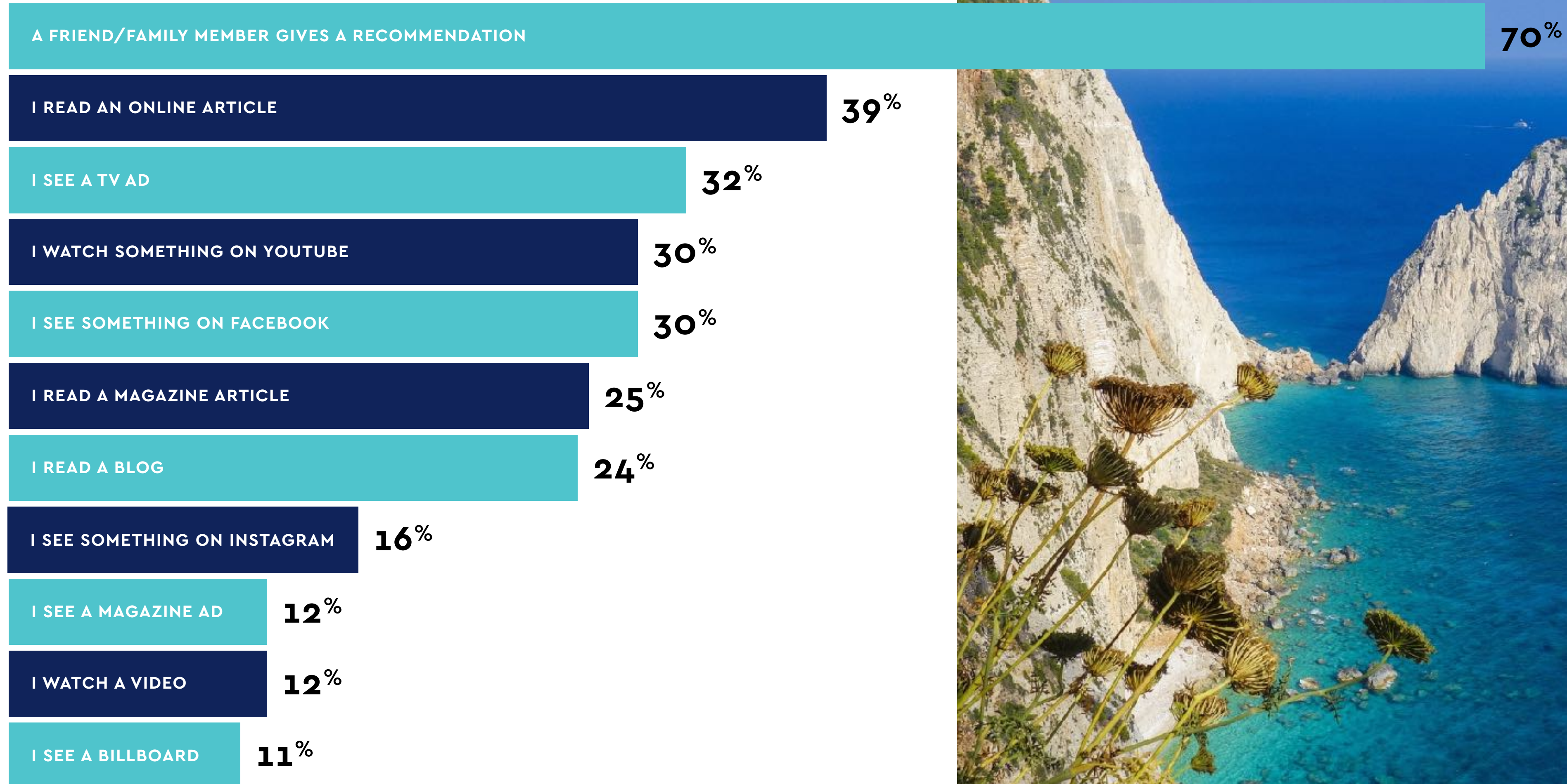
When Traveling Domestically How Do You Prefer To Get Around?

- They bow to whatever is most convenient, but **Uber** plays a big role
- Boys are bigger users of Uber, girls are more likely to walk or use whatever is convenient



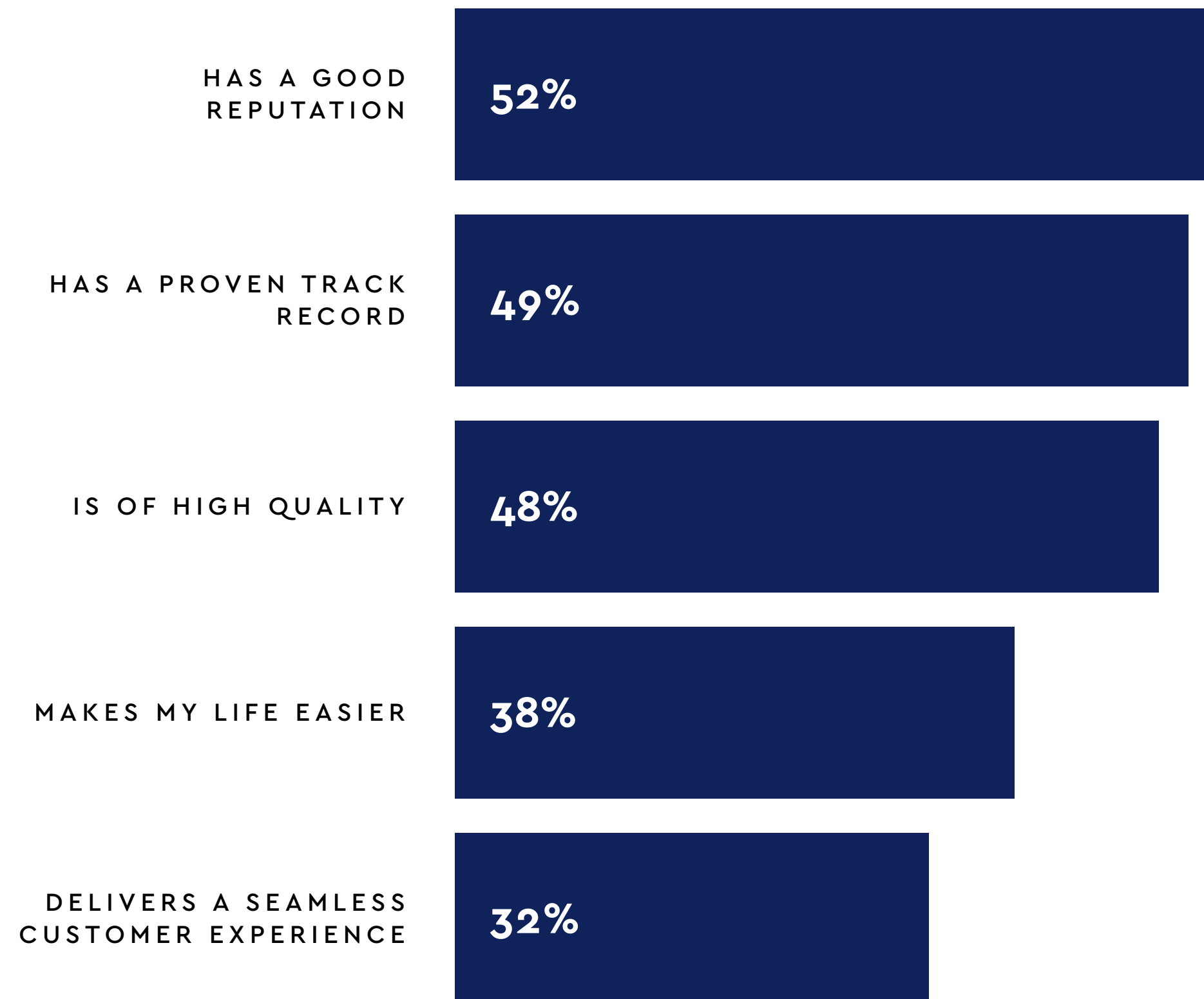
Which Information Sources Do You Trust Most?

MILLENNIAL TRUST IN MEDIA CHANNELS:

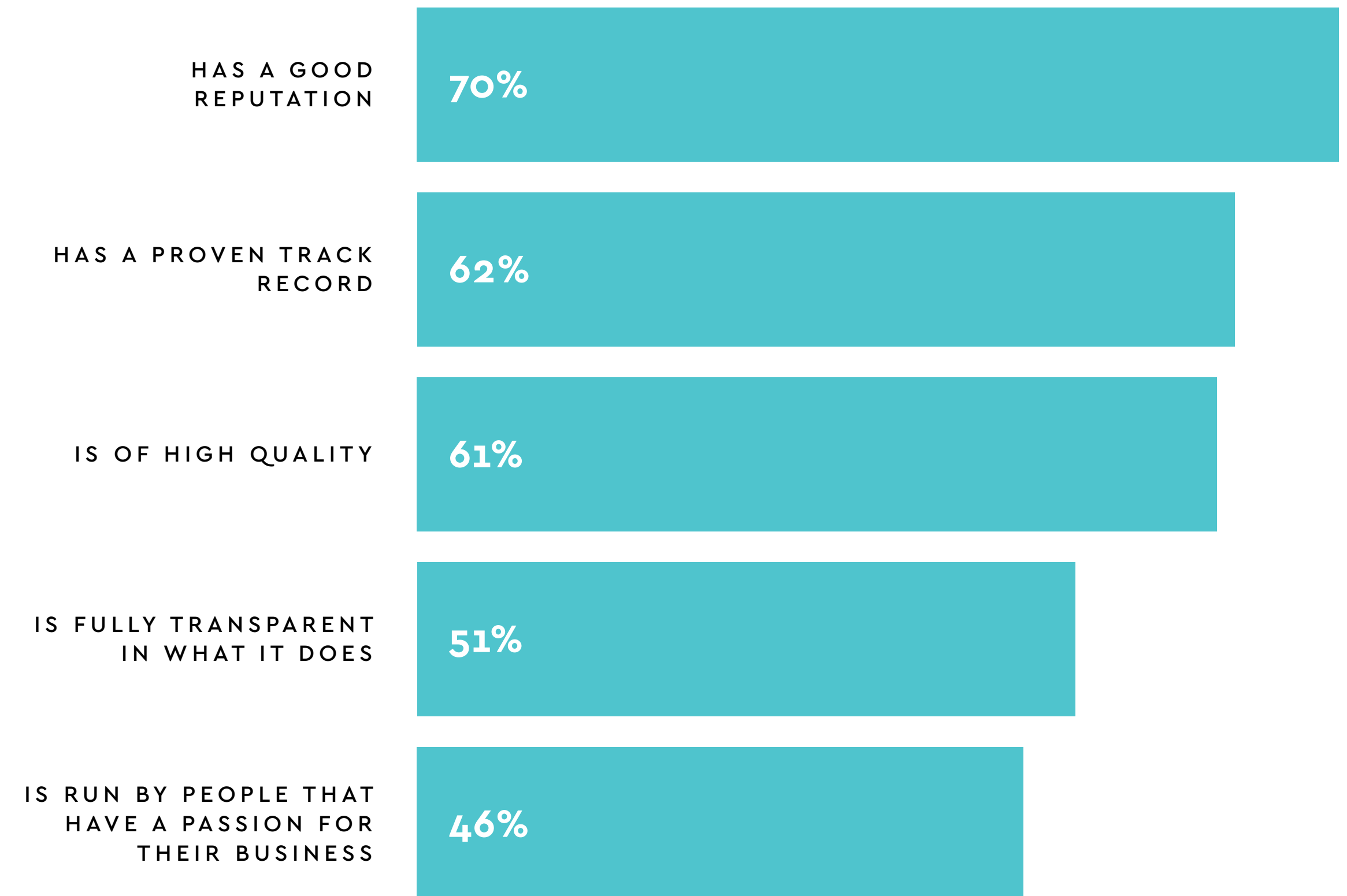


What drives you to trust a travel business or brand?

MILLENNIAL



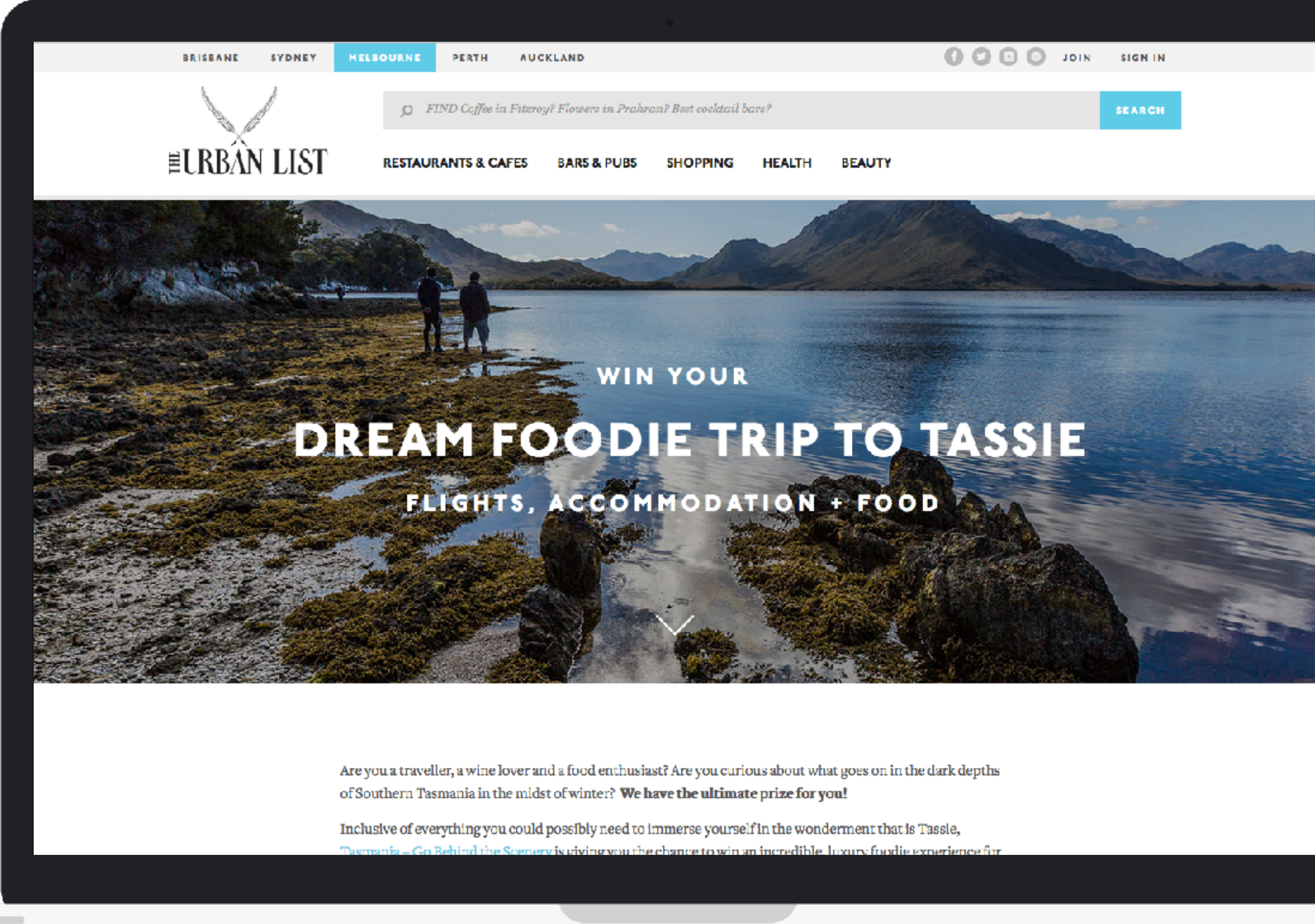
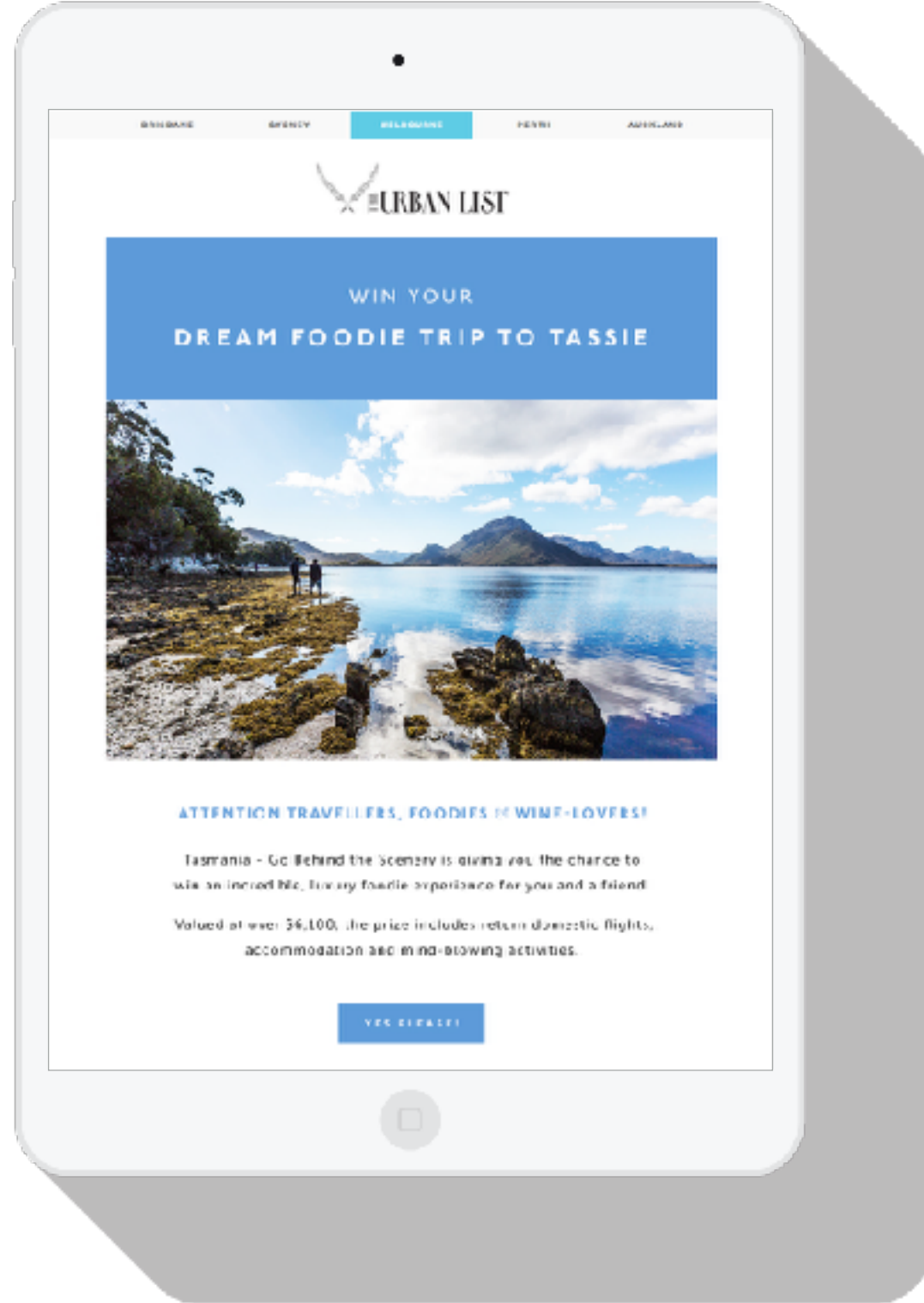
BABY BOOMER



Where Do Travel Brands Fall On The Trust Scale?



Our readers have spoken: Tasmania is their #1.



18,000 ENTRIES IN 2 DAYS

WE'RE ALL IN THIS TOGETHER.

LET'S GET THESE MILLENNIALS ON THE ROAD.

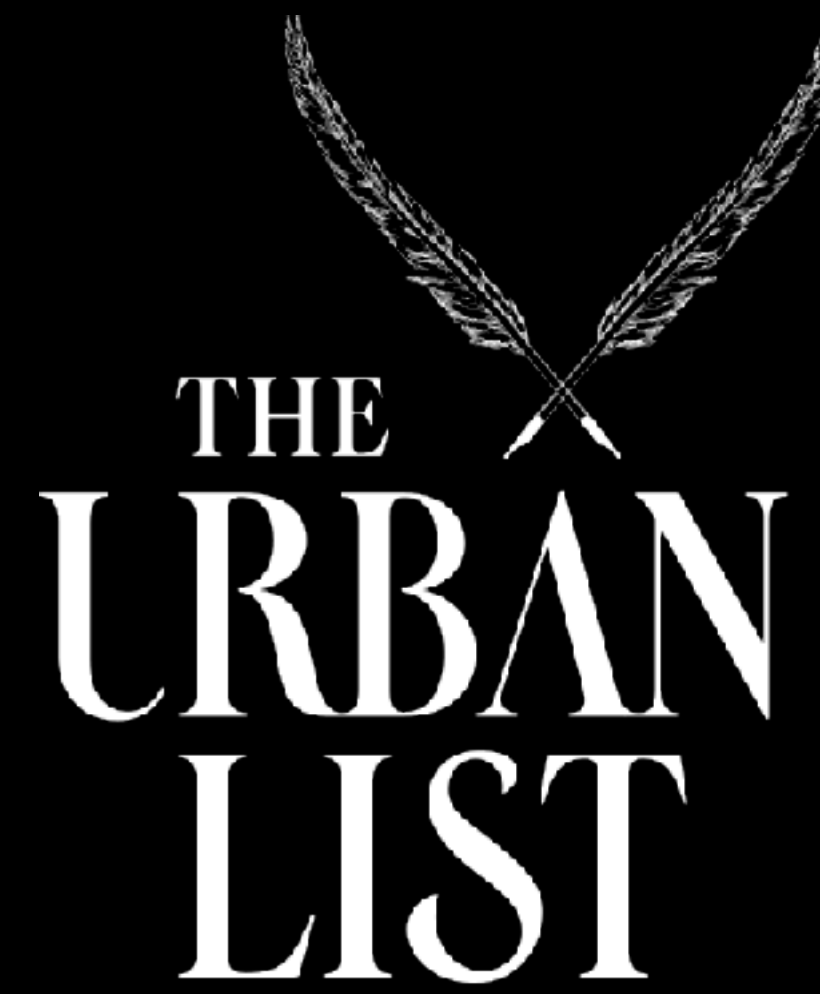


WE'RE JUST A LITTLE BIT PROUD TO BE

AUSTRALIA'S #1 LIFESTYLE GUIDE



SOURCE: NIELSEN MARKETING INSIGHTS, APRIL 2017



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