Methodology
The Consumer Demand Project (CDP) is a large scale online survey run annually since 2012 by BDA on behalf of Tourism Australia, with Tourism WA and other STOs also partnering in the project in 2016 and 2017. Each year the survey samples “Out of Region” travelers (i.e. those who have travelled or intend to travel beyond neighboring countries) in 11 core international markets (Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA & UK), as well as the domestic market. In 2017 six additional international markets were surveyed and of these, Tourism WA chose to purchase results for Hong Kong, giving Tourism WA access to insights from a total of 12 international markets for 2017.

Purpose
The purpose of the CDP is to annually monitor Australia’s brand health in relation to competing destinations, and to provide insight into the changing perceptions, motivations, and desires of consumers. More recently, data from CDP has been used to identify potential opportunities to grow the value of tourism in WA, and understand how best to capitalise on those opportunities. Insights from CDP can be used by Tourism WA to drive strategy and campaign development. By understanding what motivates consumers, and WA’s relative strengths and weaknesses, Tourism WA can craft its marketing messages to build demand and stimulate bookings.

Using Insights
CDP is a consumer-led evidence base that Tourism WA and key industry stakeholders can utilise to identify potential opportunities to grow the value of tourism in WA, and understand how best to capitalise on those opportunities. Insights from CDP can be used by Tourism WA to drive strategy and campaign development. By understanding what motivates consumers, and WA’s relative strengths and weaknesses, Tourism WA can craft its marketing messages to build demand and stimulate bookings.

Interpreting this report
This report summarises results from the 2017 CDP into a narrative format, with implicit references to results from previous years (e.g. noteworthy shifts over time are highlighted). Throughout this report, “international markets” or “international travelers” refers to the average results of long haul travelers from the 11 core international markets combined (see methodology section for list core markets).

For any questions about this report, please contact the Tourism WA Strategy and Research team via research@westernaustralia.com
Important Destination Choice Factors

When selecting an out of region holiday destination, safety and security is the most important factor considered by international markets. Nature and wildlife is the second most important factor, and has been growing in importance over the last four years. Value for money and good food and wine make up the top four most important destination choice factors. World class coastlines, beaches and marine wildlife is growing in importance and ranked as the 7th most important destination choice factor in 2017.

Note: Historical data re-weighted for World Class Coastlines due to change in question methodology.
Association with Australia and Competing Destinations

Of all out of region countries (i.e. core competing destinations), Australia is ranked as the 1st or 2nd country most strongly associated with each of these important choice factors, and has maintained that positioning over the last five years. The one exception to this is good food and wine; Australia ranks 5th on this factor and association has been easing over the last few years (dropping from 3rd ranking in 2013).

Over the last few years, Japan’s competitive positioning has been improving, moving up the ranks in terms of association with safety and security and value for money and emerging as a serious competitor for visitation from South East Asian markets.

Competitive Importance Factor Associations

Questions: You said [factor] is important to you. Which of these destinations do you associate with [factor]? Aggregate includes 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK. Numbers represent proportion of those who consider attribute important that associate attribute with the destination.
International Markets

Purchase Funnel - Australia

With Australia’s very high association across the most important destination choice factors, it is not surprising that Australia is ranked as the number one out of region country in terms of consideration and intention to visit, and performs well ahead of competitor destinations on these measures. However, consideration and intention to visit Australia has weakened over the last year as Japan continues to gain significant ground.

Consideration and Intention

Questions: Which of the following destinations are you considering travelling to in the next 4 years? Which of the following destinations are you actively planning to visit for a holiday in the next 2 years? Aggregate includes 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK. Numbers represent proportion of total respondents.
International Markets

Purchase Funnel – WA

The CDP goes one step further and provides a competitive purchase funnel for destinations within Australia. For ease of analysis and interpretation, specific destinations are aggregated to provide State and Territory rankings throughout the funnel (i.e. Perth, Broome / the Kimberley, and Margaret River aggregated into Western Australia).

WA performs most strongly with Singapore and Malaysia, ranking 4th through the funnel & up to 2nd for visitation. For most markets, WA ranks more strongly for visitation than it does for consideration and intention, with aviation accessibility likely aiding conversion.

There is significant opportunity to improve WA’s ranking in the early stages of the purchase funnel, namely consideration and experience awareness, which will in turn drive intention and visitation to the State.

WA Competitive Purchase Funnel

Questions: Which of the following Australian destinations are you considering travelling to in the next 4 years? How aware would you say you are of the holiday experiences on offer in the following Australian destinations? Which of the following Australian destinations are you actively planning to visit for a holiday in the next 2 years? State aggregates calculated as a net score, e.g. the % of Aus considerers who are considering at least one prompted destination in Western Australia. Visitation derived from International Visitor Survey leisure trips YE Jun 17

Rank Among Aus States / Territories

<table>
<thead>
<tr>
<th>2017</th>
<th>Indonesia</th>
<th>Singapore</th>
<th>Malaysia</th>
<th>Korea</th>
<th>Japan</th>
<th>China</th>
<th>Hong Kong</th>
<th>India</th>
<th>NZ</th>
<th>Germany</th>
<th>UK</th>
<th>USA</th>
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</tbody>
</table>

Consideration

Experience Awareness

Intention

Visitation
International Markets

Purchase Funnel – WA

A look at how WA’s destination perform when consumers are asked, unprompted, to name the most desirable holiday destinations in Australia demonstrates the significant opportunity to improve WA’s top of mind awareness. Perth is the only WA destination to be mentioned unprompted, and ranks 5th behind Sydney, Melbourne, Gold Coast, Great Barrier Reef. Even amongst South East Asian markets (Indonesia, Malaysia, and Singapore), Perth moves into 4th position and remains outperformed by Sydney, Melbourne and the Gold Coast.

Australia’s Most Desirable Locations

Question: What do you consider to be the most desirable holiday destination in Australia? (open-ended response). Numbers represent proportion of those considering visiting Australia.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>28</td>
</tr>
<tr>
<td>Melbourne</td>
<td>11</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>10</td>
</tr>
<tr>
<td>Great Barrier Reef</td>
<td>6</td>
</tr>
<tr>
<td>Perth</td>
<td>4</td>
</tr>
<tr>
<td>Tasmania</td>
<td>2</td>
</tr>
<tr>
<td>Queensland</td>
<td>2</td>
</tr>
<tr>
<td>Uluru</td>
<td>2</td>
</tr>
<tr>
<td>Brisbane</td>
<td>2</td>
</tr>
<tr>
<td>Canberra</td>
<td>1</td>
</tr>
</tbody>
</table>

Top Destinations (Open-ended Response)

% of those considering visiting Australia
International Markets

Associations with WA Destinations and other Australian Destinations

Similarly, there is significant opportunity to grow association between WA’s key destinations and destination choice factors that are of high importance to the consumer and have been identified as thematic priorities by Tourism Australia, that being nature and wildlife, aquatic and coastal, and food and wine. While these factors align very strongly with WA’s destination and product offering, currently their association with WA destinations is below average. This is particularly the case for nature and wildlife, where out of 20 prompted Australian destinations, Perth, Broome / the Kimberley and Margaret River are all ranked in the bottom half (12th, 14th and 18th respectively).

Australian Destination Association

Questions: Which of these Australian destinations do you associate with [factor]?
Average includes 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.

<table>
<thead>
<tr>
<th>Nature and Wildlife</th>
<th>Aquatic and Coastal</th>
<th>Food and Wine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kangaroo Island</td>
<td>Gold Coast</td>
<td>Sydney</td>
</tr>
<tr>
<td>Cairns / Great Barrier Reef</td>
<td>Sydney</td>
<td>Melbourne</td>
</tr>
<tr>
<td>Blue Mountains</td>
<td>Great Ocean Road</td>
<td>Gold Coast</td>
</tr>
<tr>
<td>Kakadu National Park</td>
<td>Kangaroo Island</td>
<td>Brisbane</td>
</tr>
<tr>
<td>Gold Coast</td>
<td>Byron Bay</td>
<td>Perth</td>
</tr>
<tr>
<td>Uluru/Ayers Rock</td>
<td>Phillip Island</td>
<td>Adelaide</td>
</tr>
<tr>
<td>Great Ocean Road</td>
<td>Perth</td>
<td>Canberra</td>
</tr>
<tr>
<td>Sydney</td>
<td>Brisbane</td>
<td>The Barossa</td>
</tr>
<tr>
<td>Melbourne</td>
<td>Phillip Island</td>
<td>Tasmania/Hobart</td>
</tr>
<tr>
<td>Phillip Island</td>
<td>Perth</td>
<td>Darwin</td>
</tr>
<tr>
<td>Perth</td>
<td>Brisbane</td>
<td>Byron Bay</td>
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<tr>
<td>Brisbane</td>
<td>Phillip Island</td>
<td>Darwin</td>
</tr>
<tr>
<td>Margaret River</td>
<td>Canberra</td>
<td>Canberra</td>
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<tr>
<td>Darwin</td>
<td>The Barossa</td>
<td>Jakarta</td>
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<tr>
<td>Byron Bay</td>
<td>Phillip Island</td>
<td>Jakarta</td>
</tr>
<tr>
<td>Adelaide</td>
<td>Phillip Island</td>
<td>Jakarta</td>
</tr>
<tr>
<td>Broome/Kimberley region</td>
<td>Phillip Island</td>
<td>Jakarta</td>
</tr>
<tr>
<td>Canberra</td>
<td>Phillip Island</td>
<td>Jakarta</td>
</tr>
<tr>
<td>The Barossa</td>
<td>Phillip Island</td>
<td>Jakarta</td>
</tr>
<tr>
<td>None of the above</td>
<td>Phillip Island</td>
<td>Jakarta</td>
</tr>
</tbody>
</table>

% of Aus Considerers

Nature and Wildlife

- Kangaroo Island: 58%
- Cairns / Great Barrier Reef: 51%
- Blue Mountains: 50%
- Kakadu National Park: 50%
- Gold Coast: 49%
- Uluru/Ayers Rock: 45%
- Great Ocean Road: 41%
- Sydney: 39%
- Melbourne: 38%
- Phillip Island: 35%
- Perth: 34%
- Brisbane: 30%
- Margaret River: 30%
- Darwin: 29%
- Byron Bay: 27%
- Adelaide: 25%
- Broome/Kimberley region: 24%
- Canberra: 23%
- The Barossa: 21%
- None of the above: 3%

Aquatic and Coastal

- Gold Coast: 54%
- Cairns / Great Barrier Reef: 49%
- Sydney: 40%
- Great Ocean Road: 31%
- Kangaroo Island: 29%
- Byron Bay: 24%
- Phillip Island: 23%
- Perth: 22%
- Brisbane: 21%
- Melbourne: 20%
- Tasmania/Hobart: 18%
- Adelaide: 13%
- Blue Mountains: 13%
- Margaret River: 13%
- Kakadu National Park: 12%
- Darwin: 11%
- Canberra: 10%
- Phillip Island: 10%
- Broome/Kimberley region: 9%
- Uluru/Ayers Rock: 9%
- The Barossa: 7%
- None of the above: 4%

Food and Wine

- Sydney: 49%
- Melbourne: 47%
- Gold Coast: 40%
- Brisbane: 29%
- Perth: 27%
- Adelaide: 24%
- Canberra: 20%
- The Barossa: 18%
- Tasmania/Hobart: 16%
- Cairns / Great Barrier Reef: 15%
- Margaret River: 15%
- Blue Mountains: 14%
- Great Ocean Road: 12%
- Darwin: 12%
- Byron Bay: 11%
- Phillip Island: 10%
- Broome/Kimberley region: 10%
- Kakadu National Park: 8%
- Uluru/Ayers Rock: 8%
- The Barossa: 7%
- None of the above: 10%
Concept Testing

To provide a deeper insight into thematic appeals, the CDP for 2016 and 2017 has included concept testing. This helps ‘bring to life’ the insights by measuring preference and intention for a range of tourism experiences in Australia and overseas. Each year, 20 Australian and 20 overseas experiences have been tested, and the results demonstrate thematic appeals are very different for Australia compared to overseas destinations. In Australia, intention and preference is highest for aquatic and coastal experiences, followed by nature and wildlife experiences. However in overseas destinations, intention and preference is highest for history and culture and city experiences.

Themes: Experience Preference vs Intention - CDP 2016 & 2017

Questions: After seeing information on these eight holiday experiences, which would you prefer to engage in overall? Having seen this information, how likely are you to engage in these experiences in the next two years? Data points represent the average result for experiences featuring each theme. Average results include 11 key markets: Indonesia, NZ, Singapore, Malaysia, South Korea, Japan, China, India, Germany, USA, UK.
Concept Testing

In 2017 three WA experiences were included in the concept testing: Rockingham Dolphin Swim, Esperance Nature Tour, and Swan Valley ‘Sweet Temptations’ trail. The Esperance Nature Tour performed most strongly, with well above average intention and preference amongst all markets except Indonesia and New Zealand. The Rockingham Dolphin Swim also performed strongly, with above average preference amongst all markets. However, the Sweet Temptations trail had limited appeal with below average intention and preference amongst all markets with the exception of China.

These concept testing results indicate that WA’s strengths are those experiences that align with the aquatic and coastal and nature and wildlife thematic appeals, while specific food and wine experiences can be attractive to the right audiences (e.g. China and the Sweet Temptations Trail). Furthermore, combining food and wine experiences with aquatic / nature based experiences in a way that is accessible and reflective of the local environment can have broad appeal; ‘sunset fish and chips at Cottesloe beach’ was tested in 2016 and remains one of the strongest performing experiences in terms of preference and intention across multiple markets.