Noments that Natter travel



Let's set the record straight

Travel <u>is</u> a moment that matters.



of Australians say being able to travel is VERY IMPORTANT to them.

... and given various stresses, travel has become **MORE IMPORTANT for...**



Setting the scene.

Australians are some of the most well travelled people in the world.

Aussies rank

5th

as the world's most 'experienced' international travellers. Increase of



in international travel in 2023-4 versus 2022-3, with 10.2M holidaying overseas.

More than 9 in 10 intend to travel within the next 12 months.



"Every penny spare I have goes to travelling and I think the experiences I've collected as a result is n**ot something I would trade**."



Despite a context of challenges on many fronts...

Economic factors

8 in 10 are revisiting holiday budgets and expectations due to rising costs.

Full-cost planning now dominates budgetis, involving fares, *plus* meals, activities and more.

Health focus

Wellbeing has become a critical driver of *and* consideration for travelling.

2 in 5 travel to improve health, and half prioritise medical issues in their early planning.

Safety considerations

Security is a key concern for 9 in 10 Australian travellers.

80% agree travel insurance is critical these days, especially for international trips.

Emerging tech

Digital travel tools such as Al planners and QR-code ticketing are becoming norm.

While half already see this tech as useful, many will need some more guidance.

Travellers are **adapting**, not **retracting**.

Setting the scene.

The Australian **resolve** to travel has strengthened, and we are stretching our holiday horizons.

83%

Are now **OPEN TO MORE & DIFFERENT HOLIDAYS** than they were previously.



"We are starting to give up lots of the little things like multiple streaming services/pay TV to **put towards meaningful holidays instead** of mindlessly watching TV." Setting the scene.

Travellers are actively *adapting* to ensure their holidays happen

73%

are making **SACRIFICES** and/or concessions in other areas of their life in order to be able to travel. (slightly higher amongst Gen Z, 78%)

1 in 3

travellers are **JAMMING IN** multiple stops and/or trip components.

1 in 5

are WORKING WHILE AWAY,

checking emails, taking calls, even visiting sites/clients (more so amongst younger travellers, 1 in 3 of Gen Z will merge work + holiday)

travel 6

Setting the scene.

It's not about making allowances... it's about making the *holiday* special.

4 in 5

are happy to pay for INDULGENCES when on holiday, whether preplanned or spur of the moment splurges.

(especially young travellers, 88% of Gen Z are happy to spend more) These are most often LITTLE LUXURIES, but they have outsized importance

- Nice meals (48%)
- Fancy drinks (30%)
- Retail therapy (34%)
- Experiences (29%)



Moments that Matter High engagement with travel content is fueled by both enjoyment and the quest for discovering their perfect trip.

70%

say they will **REGULARLY CONSUME travel content** - even when not actively planning a trip.

81%

are ACTIVE CONTENT CONSUMERS as members, subscribers, or followers of travel content.

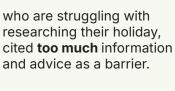
2 in 5

are looking at at least **5 separate travel-topics** at a time during their trip researching activities.



feel **OVERWHELMED** by the number of travel info sites and influencers.

There are lots of videos that show a comparison between what people upload vs what it's actually like ... it makes it hard to know what's real and what's worthwhile visiting."





It's all up for grabs..

There has never been more important time to unpack and repack the journey...

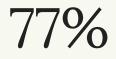
...and better understand the moments that matter.



Understanding the moments that matter.

The journey is as important as the destination.

Perhaps even more so.



Say they **ENJOY THE PLANNING** process (almost) as much as the holiday itself. 69%

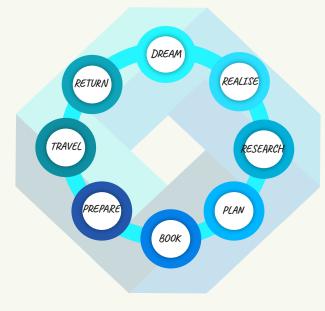
Of recent travellers describe their holiday **PLANNING ACTIVITIES AS PIVOTAL** to their successful holiday. 52%

Say FRIENDS & FAMILY COME TO THEM FOR ADVICE on booking trips.

70%

Agree they are **ALWAYS PLANNING A HOLIDAY**, with intenders currently planning avg. 2.3 trips.

Travellers describe an <mark>8-stage journey</mark> of distinct yet interrelated moments.



A 'never ending, always planning' travel story

With no clear end, or even starting point, there's an always-on cycle.

- Multiple holidays may coexist on varied horizons.
- Memories from one holiday flow into the next.

Making for a complex choreography

There's a lot of personal pressure to get it just right.

- Often managing many moving parts and priorities.
- Each decision shapes the next, and new information can prompt revisions.

... so we need to **simplify** what really matters, and when.



Introducing...

The four Moments That Matter in Travel

PLAN

Moment 0: Dream

DREAM

REALISE

Returning > Dreaming

Australians are (almost) always thinking about holidays, absorbing ideas, reflecting on past travel experiences and pondering new adventures.

How to win? Keep things casual, fun and pressure free so when people are ready, they know where to turn.

RESEARCH Moment 1: Discover

Realisation > Research > Planning

Now an active intention to "go on a holiday". Travellers deliberately gather a lot of information, first on what's possible, and then what's practical.

How to win? Be informative, yet keep your message inspirational and avoid limiting the options too much, too soon.

Moment 2: Decide

BOOK

Planning > **Booking**

Travellers are committed to "the trip", and are selecting destinations and itineraries, finalising dates, and making the booking/s.

How to win? It's time for decisions, not more ideas. Keep travellers focussed on key tasks and how to best achieve them.

Moment 3: Details

HOLIDAY

Preparations > Holiday

PREPARE

The planning isn't over. People are preparing for a worry-free trip, organising essentials and exploring 'must do/see' experiences until the very last minutes.

How to win? Engage with relevant trip information and ways to make the holiday extra special. Avoid new travel ideas or overwhelming with options that don't fit.



Understanding the moments that matter.

Marketers have only weeks to inform and influence travellers.

6 weeks

to organise the trip.

The first active stages of research, planning and booking the trip.



for travel preparations.

All the finer details that make the trip happen in the lead up to departure. From ideas to departure can be a matter of weeks, months, or a year or more.

Travellers dip in and out at various stages.

Making it more important to know and respond to the signals, and get your timing right in order to align propositions to the stage people are at.



Moments

Matter travel 14

"We knew we wanted to plan a trip, I really struggle with the researching part but understand how important it is. We **booked it all so quickly** however it was about 9 months away from when our travel days were."

Introducing the Dreaming moment





Why it matters to travellers

The crucial initiation phase sets the criteria for what a 'dream holiday' looks like. Consumers need to feel inspired and excited about potential travel, fuelling their desire to explore what's on offer.

Why it matters to brands

This stage is crucial for travel providers and brands to capture the attention of potential travellers early on, planting the seeds of inspiration that can lead to engagement and eventual bookings.

Why it matters for messaging

This is an opportunity to captivate and engage dreamers through evergreen content that sparks the holiday imagination, alongside compelling messages that encourage them to take a leap into exploring further, setting the foundation for future engagement.



Moment 00: Dreaming

RULES FOR ENGAGEMENT

DREAM REALIZE RESTARCH RAW BOOK PREMARE



"This phase for me is really characterised by curiosity, exploration and imagination ... as I envision the possibilities and set the stage for planning my next travel adventure."

What they need right now:

To feel inspired that whatever they dream, could become their holiday reality.

Prompt them forward:

Capture their imagination and give the confidence it's within reach, they just have to start.

Prevent them stagnating:

Keep things interesting and fun, so they aren't bored and underwhelmed, or feeling like it is too much or too hard right now.

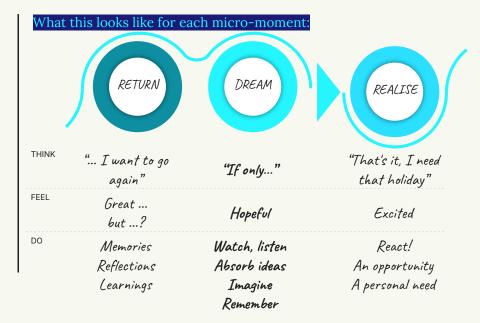
Identify the signals...

Passive Dreamers are looking and listening across all channels and content, nothing is off limits.

Those on the Active verge are lingering longer and leaning-in to:

- Inspiring published content talking to the beauty of travel
- Social conversations and sharing of ideas/experiences
- Promotional deals and ads.

Personal lifestyle factors are also a prompt to travel: stress relief, nicer weather, self development.



Moment 00: Dreaming HOW TO WIN THE MOMENT

DEGAN REVISE DEGRACES PLAN BOX PREMAE



Dreamers are really just waiting for the right excuse to travel. Keep it casual, fun and pressure free, so when they are ready to turn their dream into reality, they know exactly where to look.

Appeal to their:

Desire and unmet need for travel, right now...

Australians' key travel triggers are:

- 62% Collective (family time, celebrations)
- 56% Self (health, learning and happiness)
- 33% Timing (seasons, school holidays, major events)
- 23% Financial (a great deal, a worthy use of savings).

But they need help to know where to start

... 20% say they don't have the right level of information to get going even at this stage.

Show and tell them about..

Where and who they want to be instead...

The possibilities and benefits of travel, which are evergreen:

- A well deserved or celebration break
- Escape from today (weather, view, stress)
- Travel for wellbeing
- FOMO, must see/do.

Logistical reasons to believe, to get them over the line into active travel consideration:

- An irrefutable opportunity or deal
- Perfect timing alignment
- Luxury or comforts
- Unique features, activities.

Connect with them via:

Being present and vibrant where they are...

Always on, every channel - they're passively consuming any and everything, and happy to be distracted, or equally happy to just ignore.

Social currency - explore ways to lean into the content they engage with, follow and create or participate in.

Captivating video and images - visual cues attract their attention and trigger their imaginations (TV, print, video, social media/blogs).



A tipping point.

The shift from a Dream to Reality signals new needs and expectations

the Dreaming is PASSIVE...

Travel is an idea, its intangible, infinite.

- Travel is a limitless idea on a future horizon.
- All possibilities are considered, almost.

Realisation triggers a shift to ACTIVE...

The trip becomes a tangible experience.

- It is real and finite with a defined start and end.
- Travellers will become more serious and detail driven.

Travellers now expect brands, content and deals to be providing those details.



"Usually there's some sort of tipping moment, where the switch is flipped. When the opportunity presents itself, it's all action into the research phases"



Introducing the Discovery moment





Why it matters to travellers

Focus has shifted. Aspirational yet comprehensive and accurate information during this stage helps travellers make informed choices, reducing uncertainty and enhancing their confidence in planning their trip.

Why it matters to brands

Trust and confidence are key. Presenting clear, detailed, and relevant options can help brands stand out in a crowded market of ideas and providers, driving travellers toward your offerings.

Why it matters for messaging

Relevant information is crucial for travellers at this stage. Being an authentic and reliable resource featuring well-researched, up to date and helpful tips for their travel criteria, is critical to attracting readers and viewers.



Moment 01: Discovery

RULES FOR ENGAGEMENT



"The **abundance of choices** for destinations, accommodation, activities and logistics can be daunting, but I try to approach the planning process one step at a time."

What they need right now:

To feel confident they can have the trip they want, or need, without compromising.

Prompt them forward:

Inspire them to explore the breadth possibilities. But also give them the tools to search, filter and save so they can align to practicalities.

Prevent them stagnating:

Remove the complexity by making sure it is easy to navigate and to narrow or filter out options.

Identify the signals..

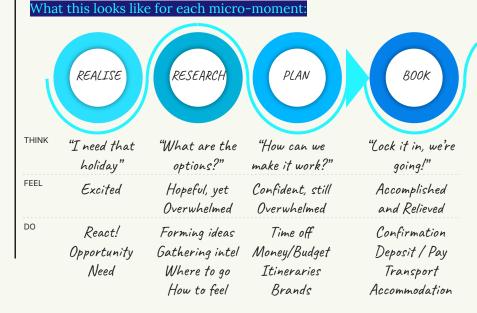
Travellers are now intentionally searching for and clicking on content.

They are narrowing slightly, but still open to possibilities:

- Regions and destinations
- Timeframes, times of year but not exact dates.

That said, they are starting to actively filter *out* based on other suitability parameters:

- Budget
- Lifestyle suitability
- Desired outcome (e.g. relax vs energise)



Moment 01: Discovery

HOW TO WIN THE MOMENT



Keep the mood inspirational and beware of being too limiting at this stage, it has to work practically but they're not quite ready for the hardest truths.

Appeal to their:

Need to feel confident they can find and make a decision...

They want to be informed:

- 90% are actively seeking information, but not always finding it
- 3 sources and 5 topics are being referenced, on average
- 1 in 3 report feeling Overwhelmed, Anxious & Rushed

Look to support but also challenge their expectations

- 63% have already narrowed their holiday preference
- BUT 1 in 6 also make changes or pivots here.

Show and tell them about..

A range of options that can and do work for them...

Provide casual suggestions:

- Destinations
- Accomodations
- Timing considerations
- Spend or budgeting guide
- Suitability considerations (e.g. families, accessibility, budget).

Tools to help them compare:

- Deal finders or alerts
- Price comparison
- Verified reviews and recommendations
- Inclusion checklists
- Trip calculators.

Connect with them via:

Discoverable and trusted sources...

Being easy to find - allow them to search and save, therefore revisit.

Helpful reminders - make it easy for them to resume search or convert the booking.

Expert advisors - first-hand accounts, recommendations and reviews are key influences for authentic feedback.

One-stop shopping - introduce AI planning tools, booking aggregators, package deals.



Introducing the Decision moment





Why it matters to travellers

There is a lot to co-ordinate and it's a big commitment for travellers. They're looking for insights on how to find the best options and ways to streamline the booking process, helping them feel both confident and excited about their choices.

Why it matters to brands

By guiding travellers on where, when and how to make their holiday a reality, brands can demonstrate care and understanding for travellers at this critical stage. This will also lead to them securing their bookings, and establishing the foundation for loyalty.

Why it matters for messaging

Insightful content that highlights the best available options and provides clear comparisons and advice, will aid consumers in making confident decisions. In turn, this elevates engagement and builds trust with audiences.



Moment 02: Decision

RULES FOR ENGAGEMENT

PLAN

DREAM REALISE RESEARCH



"I get anxious when booking as **I want to get it right**, which can slow down progress and sometimes I miss out on options I was hoping for because I'm bogged down in research."

What they need right now:

To successfully book the the main components of their trip, and secure their dream holiday.

Prompt them forward:

Help them organise and manage the many moving parts, and provide tools that make it easy to coordinate their ideas and bookings.

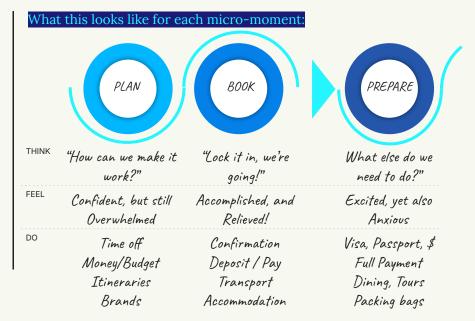
Prevent them stagnating:

Help them keep track of their decisions and be transparent so there aren't any shocks or surprises (e.g. costs, T&Cs).

Identify the signals...

They have a good idea of what they want, now their interests and search criteria are about helping them make those choices:

- A pinpoint location (e.g a port, a town or city, an address)
- Exact travel dates
- Transport logistics
- Side by side comparisons of individual providers and brands
- Real costs, not ballpark
- Lifestyle fit (e.g family facilities, accessibility, VIP experiences)



Moment 02: Decision HOW TO WIN THE MOMENT

PLAN



Help them stay focussed on what they need to do for this trip, to make sure they don't miss an opportunity. It's the time for information, not new ideas.

Appeal to their:

Excitement to make the dream a reality...

43% come into this moment feeling Hopeful.

Address potential FOMO and ensure they're not missing the 'best' opportunities ... because they're making the big commitments now:

- 79% are booking accommodation
- 75% securing primary trip transport (flights, cruise, car)
- 70% organising transfers to/from
- 65% buying travel insurance.

Almost half feel accomplished and relieved once they're done.

Show and tell them about..

The best way to secure their perfect holiday...

Services and tools to focus and simplify:

- Deal finders and alerts
- Loyalty rewards options
- Booking T&Cs / flexibility
- Itinerary builders (e.g. AI)
- Suggested blogs, groups, influencers
- Travel supports for visa, insurance, etc.

Ways to manage all their plans and celebrate:

- Travel planner app or folder
- Booking aggregators
- Trip countdowns.

Connect with them via:

Helping them make well- informed decisions...

Direct from source - branded, authorised and official gives travellers confidence.

'Expert' advisors - highlighting the tips and tricks from those in the know, to find best advice and deals.

Alerts and reminders - timely and convenient prompts to resume/make that booking.

Tools to streamlining booking - help them coordinate and match the various components.



Introducing the Details moment





Why it matters to travellers

Attention to detail in this stage ensures travellers are well-prepared and informed, reducing last-minute issues and enhancing their overall travel experience. Their holiday dreams can then truly become reality.

Why it matters to brands

Providing thorough and helpful information about the destination and travel requirements can help brands be seen as true travel partners. In turn, satisfied travellers become repeat visitors and advocates.

Why it matters for messaging

The opportunity is to impact travellers and keep them engaged for the duration of their travel timeline. Checklists and guides addressing practical aspects of travel preparation, as well as the fun 'on holiday' opportunities can drive ongoing engagement and readership.



Moment 03: Details

RULES FOR ENGAGEMENT

DREAM REALISE RESEARCH PLAN BOOK



"There's a mix of excitement and apprehension. Double checking packing lists, last minute arrangements and **ensuring everything is in order** contribute to a anxious but exhilarating mood."

What they need right now:

PREPARE

HOLIDAY

To cover all the bases and feel assured their trip will be as exceptional as the dream.

Prompt them forward:

Keep them engaged and informed with both:

- Necessary trip preparations (e.g visa, money, packing).
- Exciting "must see/do" experiences while on the trip.

Prevent them stagnating:

Be clear and focussed on the current trip they're booked, avoid new messages that are irrelevant or overbearing.

Identify the signals:

Travellers are leaning into the fun on-the-ground topics:

- Where to eat
- How to get around
- What to pack

They're also joining and even interacting with blogs, influencers and groups linked to their plans.

Watch-out: They're not likely to be suddenly shifting dates or destinations, but this may be the cue for a different trip and journey.

What this looks like for each micro-moment HOLIDAY PREPARE RETURN THINK "Woo! I'm on "... hmmm, next What else do we need holiday" to do?" time?" FEEL Excited, yet also Excited, and Great ... Anxious Grateful but ...? DO Visa, Passport, \$ Experience Memories Full Payment Eat, Drink Reflections Dining, Tours Indulge Learnings Packing bags Spend!

Moment 03: Details

HOW TO WIN THE MOMENT



Feed (but not overfeed) their travel bug continually - with relevant trip information, and excite them with ideas on how to make it extra special.

Appeal to their:

DREAM REALISE RESEARCH PLAN BOOK

Both their emotional and literal need to have the perfect trip...

2 in 3 are naturally feeling Excited.

... BUT, 1 in 4 still feel Worried and/or Rushed.

Help them feel prepared, so that they can truly enjoy and experience when on holiday:

- 57% are still making trip reservations at this stage.
- 65% say once on the holiday, budget can go out the window.

Show and tell them about..

Being prepared and ready to travel... All the potential 'fun' things they can experience and plan or save for:

- Local Meals/Drinks
- Landmarks, Attractions
- Experiences (tours, VIP)
- Shopping options.

Also a crucial time to make sure they're organised and aware:

- Packing guides
- Local customs, laws, health and safety
- Valid passports, visa etc
- Currency and funds
- Connectivity (e.g Wi-fi, SIM).

Connect with them via:

In the know sources and resources that give confidence...

Official links - the trusted and genuine sources of information, and to securely book or pay.

List it out - outlining the top must do or see, aligned to their travel plans.

Planners - apps, spreadsheets, notes that keep them organized and on track.

Trusted advisors - Reviews and recommendations are key.

Perfect timing - avoid bombarding them with too much, too soon, or too late.



The next moment...

Don't underestimate the impact of **Returning Home**

Returning is not easy, and is the hardest of all 8 travel stages for travellers.

93% say their trip was everything they wanted it to be almost.

... and so they want to prolong the holiday vibe and relive the feeling.

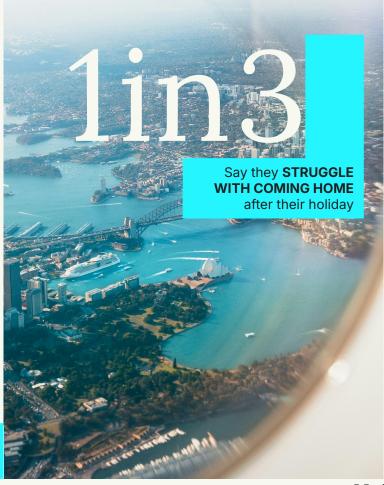
Photos, souvenirs and sharing or posting help.

BUT, returning also re-triggers a return to the Dreaming phase.

3 in 5 travellers rely on past experience when it comes to info and inspo.

This is when and how travellers evaluate the success of their trip, and how it might impact their future travels.

"Coming home from holidays is always so bitter sweet"





Now we know the **moments**, which ones **matter most for you?**

Travellers will have different considerations and decisions along their trip planning journey, and its important to tailor to their unique travel needs ...



How can you win across the holiday spectrum?

We will focus in on three of the more complex and dominant traveller journeys





The Moments that Matter in

Family Travel

Take action and target the Family Traveller Intent connect



What you need to know about Family Travellers

Holidays for families with kids are about pleasing the many, not the few

There is more at stake

Travelling with kids of any and all ages, adds an extra level of consideration and critique to the planning process.

More people mean higher costs, as well as finding the right balance of capacity, activities, and timing to please them all. Accessibility, dietary or health factors are also crucial family trip considerations.

Whatever it takes to travel A little luxury, for everyone

Family travellers are most open to more and different options... as long as they are safe, familiar and well equipped.

They are also more willing to adjust in order to make trips happen, whether that means parents are working while away, pivoting due to cost of living, or planning multi-stop trips with full and active days. Family travellers are seeking little pockets of indulgence whilst on holiday, and they aren't averse to paying to secure it.

They're likely to be 4/5-star travellers, where safety and quality are assured and where there are opportunities to have some little luxuries included or readily available. Understanding Family Travellers

Travel is an actively sought and actively considered part of family life



High importance of Travel	82%	83%
More important than before	54%	52%
More open to more options now	88%	82%
COL pressures have impacted	87%	79%
Enjoy the holiday planning process	83%	75%
Always planning a holiday	75%	69%
Regular travel content	75%	69%
Prefer big cities/major dest.	68%	58%
Consider self luxury/4-5 star	65%	56%
Al/tech are useful travel tools	63%	50%



Safe and secure	96%	95%
Ability to change / cancel	91%	86%
Child friendly/suitable	91%	38%
Recommended / good reviews	82%	71%
Shopping options	83%	71%
Environmental / sustainable	76%	70%
Loyalty points earn/use	72%	61%
Popular / famous destination	69%	58%
Access to luxury or VIP	68%	55%
Inclusive / Accessible	67%	55%





Over budget	22%	14%
On budget / NA budget	64%	69%
Under budget	5%	6%
Willing to spend (total)	81%	72%
Meals &/or Drinks	59%	52%
Accommodation	33%	21%
Souvenirs and Shopping	41%	32%
Tours, Guides, Experiences	37%	27%
Transport	14%	11%

NOTE: comparison is to those taking trips without kids

Understanding Family Travellers

Family travellers have different expectations and practical needs based on lifestage

The journey and key moments are constant, however there are different family travel considerations:

Little kids

What matters more:

- Accessibility (e.g. pram access, kids welcome, breastfeeding)
- Shopping (supplies and backups)
- Active trips, filling the days
- Favourable weather
- Health, medical
- Willing to spend 'extra' on accommodation (space, comfort).

Primary aged

What matters more:

- A variety of options
- Well-known destinations
- Attractions (theme parks, zoos)
- VIP options (for mum and dad).

Teens & Young Adults

- What matters more:
- Activities & Entertainment
- Major cities (vs smaller towns)
- Shopping (souvenirs, retail therapy)
 and they are willing to spend.

Moments

travel 38

Understanding Family Travellers

At every moment, think about the dreams of the many, versus the few.

PLAN







Moment 0: Dreaming Returning>Dreaming

The always-on state of "if only" imagination and inspiration.

What's different for Families...

The 'dream' is multifaceted, it needs to serve multiple needs and expectations. They're leaning into other families experiences to inspire their own.

How to win their moment...

Curate engaging content, with imagery and messages that showcase wide and authentic family moments.

Moment 1: Discovery Realisation>Research>Plan

RESEARCH

The active intention and information gathering stages.

What's different for Families...

They have a wider consideration set yet a wider criteria, seeking more and early assurance and detail around suitability for their family / life stages.

How to win their moment...

Prioritise 'kid friendly' (e.g. dining, accomodation, facilities), to help them quickly filter to the relevant options.

Moment 2: Decide Planning>Booking

Turning ideas into confirmed (and paid for) bookings.

What's different for Families...

BOOK

The advice and experiences of other families help make, or break, final decisions. Although willing to DIY, they would prefer to simplify via package deals.

How to win their moment...

Remove effort and think about how to curate and/or guide them to great value, recommended family focussed deals.

Moment 3: Detail Preparations>Holiday

PREPARE

The finer details of ensuring the trip runs smoothly.

HOLIDAY

What's different for Families...

Double and triple checking the details, ensuring they have the bases covered for everyone and everything to go smoothly.

How to win their moment...

Ensure that the smallest of details are easy to find, and allow them to pre-plan/organise as much as possible.

How to win with Family Travellers

Always strive to make mum and dad the holiday heroes, and never the villain.

There is more at stake

Clearly signpost family-friendly options and emphasise something for everyone.

Showcase diverse and flexible solutions, specifically catered to all ages to help boost confidence and comfort.

Allow families to customise and specify their preferences, provide direct contact details for reassurance, and leverage Al tools to help curate their perfect itinerary.

Whatever it takes to travel

Support family travellers in making the best decisions without feeling like they are compromising.

Make it easy for them to compare travel options, with detailed information including any cost implications.

Include practical details such as local shops for supplies and gifts, nearby playgrounds, kids menus, accessibility features, wi-fi quality, even pool depth.

A little luxury, for everyone

Appeal to the idea of 'happy kids, happy parents'. Highlight little treats that families can enjoy together, and/or separately.

Emphasise the value of upgrades and indulgences as memorable keepsakes, a holiday well spent.

Promote the peace of mind and convenience of organising kids clubs, private tours/outings and meals.



The Moments that Matter in

Ocean Cruising

Take action and target the Cruise Traveller



What you need to know about Ocean Cruisers

Highly engaged and engaging travellers, they love to be part of the narrative

They're the experts

Cruisers are passionate about travel, especially cruising. More than half have another cruise planned.

They are savvy, staying on budget and knowing exactly what to look for.

And when they aren't cruising, they're constantly engaging with the cruising community via social media and blogs.

Purposeful and particular

Cruisers dedicate more time to planning than other travellers.

They research extensively, seek expert input, and carefully curate their voyage, the right brand, ship and stateroom.

They're also highly aware of the cruising nuances, from packing tips to health and port considerations.

Seeking to 'sea' more

Wonder and Indulgence are top travel goals, and cruisers seek to strike the balance of a 'comfortable adventure'.

There is also desire for more variety in itineraries and experiences.

1 in 4 cruisers are flying overseas for their sailing, and 2 in 5 extend their holidays beyond the cruise.

Understanding Ocean Cruisers

Discerning travellers who like to be involved as much as they can be with cruising

Travel Values			Trip Boo Conside		ıs	Trip Bue & Spend	<u> </u>	
High importance of Travel	90%	81%	Safe and secure	97%	95%	Spent over budget	12%	1
More important than before	61%	51%	Weather/climate	95%	88%	On budget / NA budget	70%	6
Travel insurance is v.important	90%	77%	Specific destination	93%	92%	Under budget	9%	
More open to different options	89%	82%	Affordability	93%	93%			
Enjoy the planning process	88%	75%	Ability to change/cancel	88%	87%	Willing to spend 'extra'	79%	7
Will pay for some indulgences	87%	83%	Particular travel brand	87%	61%	Meals &/or Drinks	53%	Ę
Always planning a holiday	86%	68%	Recommended/good reviews	84%	72%	Souvenirs and Shopping	42%	~
Like to fill my days on holiday	83%	84%	Environmentally friendly	78%	70 %	Tours, Guides, Experiences	36%	2
Regularly read travel content	82%	68%	Access to luxury or VIP	77%	55%	Accommodation	19%	2
Sacrifice other things to travel	82%	71%	Popular/famous option	71%	59%	Transport	16%	

NOTE: comparison is to those who are non-cruisers

16%

73% 53% 33% 28% 25%

Understanding Ocean Cruisers

The type of cruise sees some different considerations become top of mind

The journey and key moments are constant, however there are different cruiser priorities:

Domestic waters

Cruisers are more casual and comfortable, with local cruisers notably less complex.

What matters more:

- Onboard activities
- Timing (dates and duration)
- Family suitability
- Environmental considerations.

International

Longer and more diverse itineraries are demanding of more consideration and time.

What matters more:

- Cruise fares (and related travel)
- Luxury brand & inclusions
- Itinerary or ports of call
- Tours, guides, experiences
- Local customs, cuisines, currency
- Travel requirements
- Travel agent.

Family cruising

With more people to please, stakes are higher to find the right ship and itinerary.

What matters more:

- Recommendations from other cruising-families in similar life stages
- Kid friendly inclusions and ship or brand atmosphere
- Dining options
- Accessibility (on board, in-port)
- Luxury & VIP experiences.



Understanding Ocean Cruisers

Cruisers are always on, the challenge is to give them something engaging every time.

PLAN



Moment 0: Dreaming Returning>Dreaming

The always-on state of "if only" imagination and inspiration.

What's different for Cruising...

Already predisposed to travel, especially cruising, they're just waiting for the right opportunity to get into the planning process.

How to win their moment...

Keep communicating with them and prompting them with new deals, destinations and cruise line news.

Moment 1: Discovery Realisation>Research>Plan

RESEARCH

The active intention and information gathering stages.

What's different for Cruising...

Many start from a base of "cruising" (vs "holiday") and so have a tighter consideration set.

How to win their moment...

Focus on distinct brand and ship assets that suit their lifestyle or life-stage, and give them new opportunities to explore and also indulge.

Moment 2: Decide Planning>Booking

Turning ideas into confirmed (and paid for) bookings.

What's different for Cruising...

BOOK

Less able to DIY destinations and dates, cruisers can feel like they're making trade-offs and have less control at this stage.

How to win their moment...

Consider how to position itineraries and inclusions/ upgrades to feel more flexible and personal.

Moment 3: Detail Preparations>Holiday

PREPARE

The finer details of ensuring the trip runs smoothly.

HOLIDAY

What's different for Cruising...

Cruise Planners and social groups keep them intimately connected to the finer details. They're also utilising on-board booking for dining, tours, shopping and their next cruise!

How to win their moment...

Ensure offers and content aren't stale or repetitive - and excite them with early-bird deals.

How to win with Ocean Cruisers

Highly engaged and engaging travellers, they love to be part of the narrative

They're the experts

Tap into their constant planning mindset by focussing on the Dreaming phase. Intrigue them regularly with exclusive updates and offers tailored to upcoming sailings, alongside general cruise news/deals.

Engage where they are, via forums and social media groups dedicated to cruising, cruise lines, and specific sailings, where they're actively discussing their passion.

Purposeful and particular

Leverage their thirst for knowledge and love of sharing by including them and their fellow travellers in conversations.

Harness their expertise and advocacy to attract and guide newcomers to cruising, while also engaging seasoned cruisers who are looking to broaden their repertoire.

Seeking to 'sea' more

Highlight the convenience, familiarity and all-inclusive nature of cruising, particularly for families and the elderly, where simplicity is key.

Also showcase the vast potential of options that expand their horizons, such as flycruise packages to new destinations, multi-stop itineraries, themed sailings, and encourage them to explore partner brands.



The Moments that Matter in

Indulgent Getaways

Take action and target the Indulge / Afford Travellers Intent connect



What you need to know about Indulgent Getaways

They have a luxurious nature, and travel is a way for them to invest in it.

Luxury is a lifestyle

For Indulgers, travel is always top of mind, with multiple trips in the pipeline. They are also more spontaneous travellers.

Indulging is deeply personal, they crave customisation and unique experiences beyond the standard trip inclusions.

More... is more

They have the means, and are eager to invest in travel, from upgrading transport and accommodations, to micro-moments including fine dining and shopping.

Yet, they expect value/ROI. They expect the best and are more likely to protect their investment with travel insurance.

Invest time, not just money

Indulgers see themselves as travel connoisseurs - avid content consumers, frequent travellers, and trusted advisors for their friends and family.

They relish every part of the planning journey, spending extra time at each stage to ensure their experiences are nothing short of perfect. Understanding Indulgent Getaways

Travel is highly experiential, from the planning to the trip itself



High importance of Travel	90%
More important than before	66%
Will pay for some indulgences	94%
More open to different options	86%
Travel insurance is important	84%
Enjoy planning process	83%
Consider self a luxury traveller	82%
Regularly consume content	80%
Once away budget out window	80%
Always planning a holiday	78%



80%

49%

80%

83%

76%

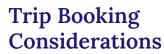
75%

51%

67%

60%

68%



97%

94%

92%

91%

84%

84%

83%

83%

76%

73%

Safe and secure
Specific destination
Weather or climate
Ability to change/cancel
Access to luxury experiences
Recommended/good reviews
Particular travel brand
Shopping options/availability
Ability to use loyalty points
A popular/famous destination





97%	Over budget	17%	16%
91%	On budget / NA budget	68%	68%
89%	Under budget	8%	5%
86%			
50%	Willing to spend (total)	86%	71%
71%	Meals &/or Drinks	66%	50%
60%	Souvenirs and Shopping	44%	31%
71%	Accommodation	37%	20%
60%	Tours and experiences	34%	28%
57%	Transport (flights, cruise)	21%	9%

NOTE: comparison is to those who are non-luxury travellers

Indulgers are willing to pay more...if they see clear value for their money.









Moment 0: Dreaming Returning>Dreaming

The always-on state of "if only" imagination and inspiration.

What's different for Indulging...

They're dreaming about where they'll stay and where they'll eat, details others get don't get into until later down the line.

How to win their moment...

Encourage them with content that offers/compares the best luxury experiences or places.

Moment 1: Discovery Realisation>Research>Plan

The active intention and information gathering stages.

What's different for Indulging...

They're more wedded to particular brands than others and seeking exclusive access to luxury experiences.

How to win their moment...

Help them identify the right fit for them by highlighting what makes different brands/services unique, accessible and valuable.

Moment 2: Decide Planning>Booking

Turning ideas into confirmed, and paid for, bookings.

What's different for Indulging...

BOOK

They're willing to pay more for a luxurious holiday, but are also seeking guarantees on having this premium reality.

How to win their moment...

Guide them to secure the most exclusive value, and assure them via 5-star reviews from equally indulgent peers.

Moment 3: Detail Preparations>Holiday

PREPARE

The finer details of ensuring the trip runs smoothly.

HOLIDAY

What's different for Indulging...

They like the finer things and finer details help them feel excited and confident of the impending luxuries.

How to win their moment...

Keep it luxe, remind them of the extra benefits and features associated with their booking (i.e wine on arrival, face towels).

Luxury is a lifestyle they are willing to invest in, but do expect a return on it

Luxury is a lifestyle

Offer Indulgers exclusive access to unique opportunities and content.

Appeal to their indulgent side, showcasing VIP experiences that go beyond typical travel deals.

Provide them with the freedom and flexibility to tailor their trips, ensuring their plans are always exciting and unique.

More... is more

Make it effortless for them to identify, add and upgrade to premium experiences, ensuring they won't miss out on the best.

Deliver expert advice which provides tailored guidance on what to do, see, and eat - enhanced by reviews and exclusive tips that highlight the value in their extra investment.

Invest time, not just money

Engage with their extroverted and involved nature. Leverage them as brand or destination advocates, while connecting them with other like-minded travellers.

Feed their appetite for luxurious content and travel options clearly marked as premium, elevated, and exclusive, making it easy for them to book more of their dream trips.



A point of comparison.

Budget-conscious travellers are underinvesting in trip planning.

Travel is important, but not a lifestyle imperative.

The budget-conscious have fewer trips in the pipeline.

And are are unlikely to take a trip spontaneously.

They are less willing to compromise in other areas of life for travel.

Cost is top of mind, but hard to manage.

Cost of living is making them less particular when deciding where, when, and what.

But affordability is a top priority in all decisions and they are purposeful.

They are less willing to splurge, whether on little luxuries or even insurance.

They're also not investing in the planning.

They spend less time in the research and planning stages.

But, this can mean they rush and don't actually find the best deals... 1 in 5 still end up over budget.

"There are times when due to things like budget constraints, I revert back from planning to researching again when looking at alternatives. I feel I am **priced out of my ideal travel plans**.



Matter travel 52



The destination.

The key takeaways for travel marketers

1. Dreaming sets the tone for the whole holiday...

- Always on and always inspirational is not just critical, but expected by Aussie travellers.
- Intrigue them with possibilities and give them a reason to say yes to travel, triggering active planning moments.

2. Make an early, but also lasting, impression...

- Turning dreams into reality can be complex to navigate, focus on the most key milestone moments.
- You need to capture their hearts and minds constantly and be there at every stage in relevant ways.

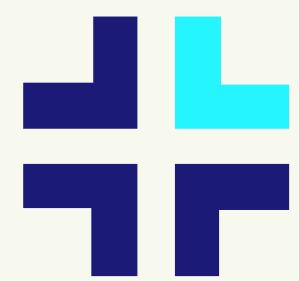
3. Beware of adding to the clutter...

- Travellers love imagery, information and insight, but they're also feeling overwhelmed.
- Give practical tools and relevant advice that helps them focus on *their* dream holiday, not someone else's.





About the Moments That Matter in Travel



In an ever-changing world, the path-to-purchase is becoming more complex and confusing. This program will look to uncover the 'Moments that Matter' in consumer decision making in 2024 and beyond.

Travel: The Approach

<u>Discovery Phase</u> | Review of latest literature, commentary and trends, plus industry reports in the travel space and adjacent sectors.

<u>Qualitative Conversations</u> (May 2024) | 4 day digital discussion board with 45 Australian travellers (recent and/or intending), to capture their nuances perspectives and language as they describe their experiences and ideals from travel.

<u>Quantitative Survey</u> (June 2024) | 20 minute online survey with n=1616 Australian travellers (recent and/or intending), focussed on understanding their journey motivations, processes, and experiences.

