



UNDERSTANDING YOUR TRAVELLERS – NOW AND IN THE FUTURE

MELBOURNE AIRPORT TOPLINE REPORT - WAVE 3

March 2021

METHODOLOGY

Here's how we got the answers

Who?



WHO IS THE TRAVELLER 'NOW'?

- Australian and foreign respondents who have visited Melbourne Airport.
- Travel propensity when restrictions are lifted

What?



WAVE 1: WHAT DID WE NEED TO KNOW?

Utilising existing segmentation data to understand who were Melbourne Airports priority segments and **how have they changed** due to COVID-19?

WAVE 2: WHAT DID WE NEED TO KNOW?

THINK conducted a second wave of the online survey, to understand how the traveller had evolved, what had changed? What will make an impact to travel?

Where?



HOW DID WE REACH THEM?

- Online survey
- 10-15 minutes duration
- Melbourne Airport's database
 - Parking list
 - Wi-Fi list
 - Facebook
 - Twitter
- **SAMPLE WAVE 1= 9,424**
 - Domestic = 5,172
 - International = 4,252
- **SAMPLE WAVE 2= 4,847**
 - Domestic = 2,467
 - International = 2,380
- **SAMPLE WAVE 3= 4,941**
 - Domestic = 2,784
 - International = 2,157

RESEARCH APPROACH

Overview of the quantitative sample composition reflective of traveller numbers at MELB

WAVE 1

May 2020

Domestic

International

5,172

4,252



**TOTAL TRAVELLERS
WAVE 1**

9,424

WAVE 2

Nov 2020

Domestic

International

2,467

2,380



**TOTAL TRAVELLERS
WAVE 2**

4,847

WAVE 3

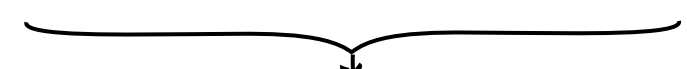
Mar 2021

Domestic

International

2,784

2,157



**TOTAL TRAVELLERS
WAVE 3**

4,941

SAMPLE DISTRIBUTION WAVE 3

Overview of the sample composition

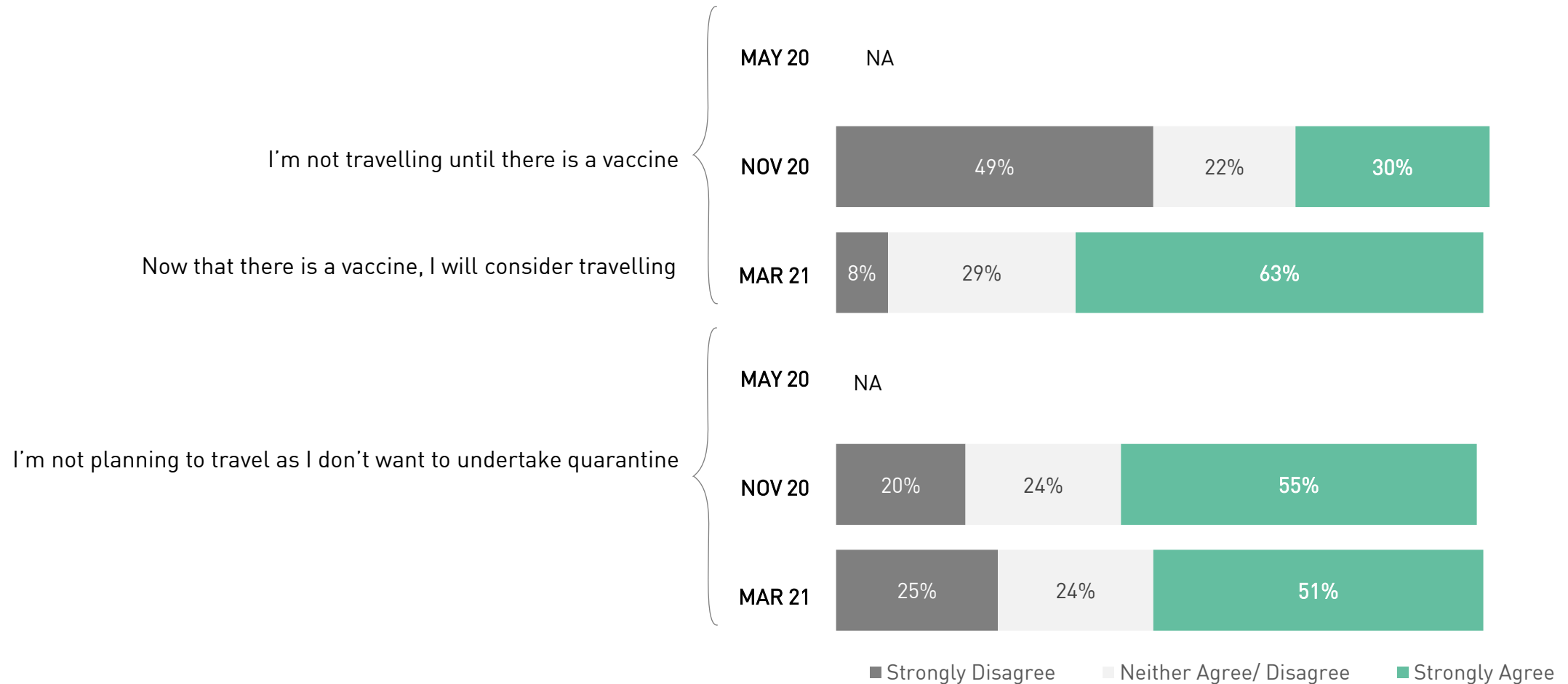
PLACE OF RESIDENCE

DOMESTIC	
VIC	58%
NSW	15%
QLD	11%
SA	5%
WA	4%
TAS	3%
NT	1%
ACT	2%

INTERNATIONAL	
Australia	81%
Other countries of Asia	5%
United Kingdom	4%
India	2%
United States of America	2%
New Zealand	1%
Canada	1%
Other European Countries	1%
Germany	1%
Japan	1%
Countries of Middle East	1%

MINDSET AND ATTITUDES IN REGARD TO TRAVELLING

The vaccine has increased traveller confidence, with willingness to travel up by 33%. Now there is a vaccine



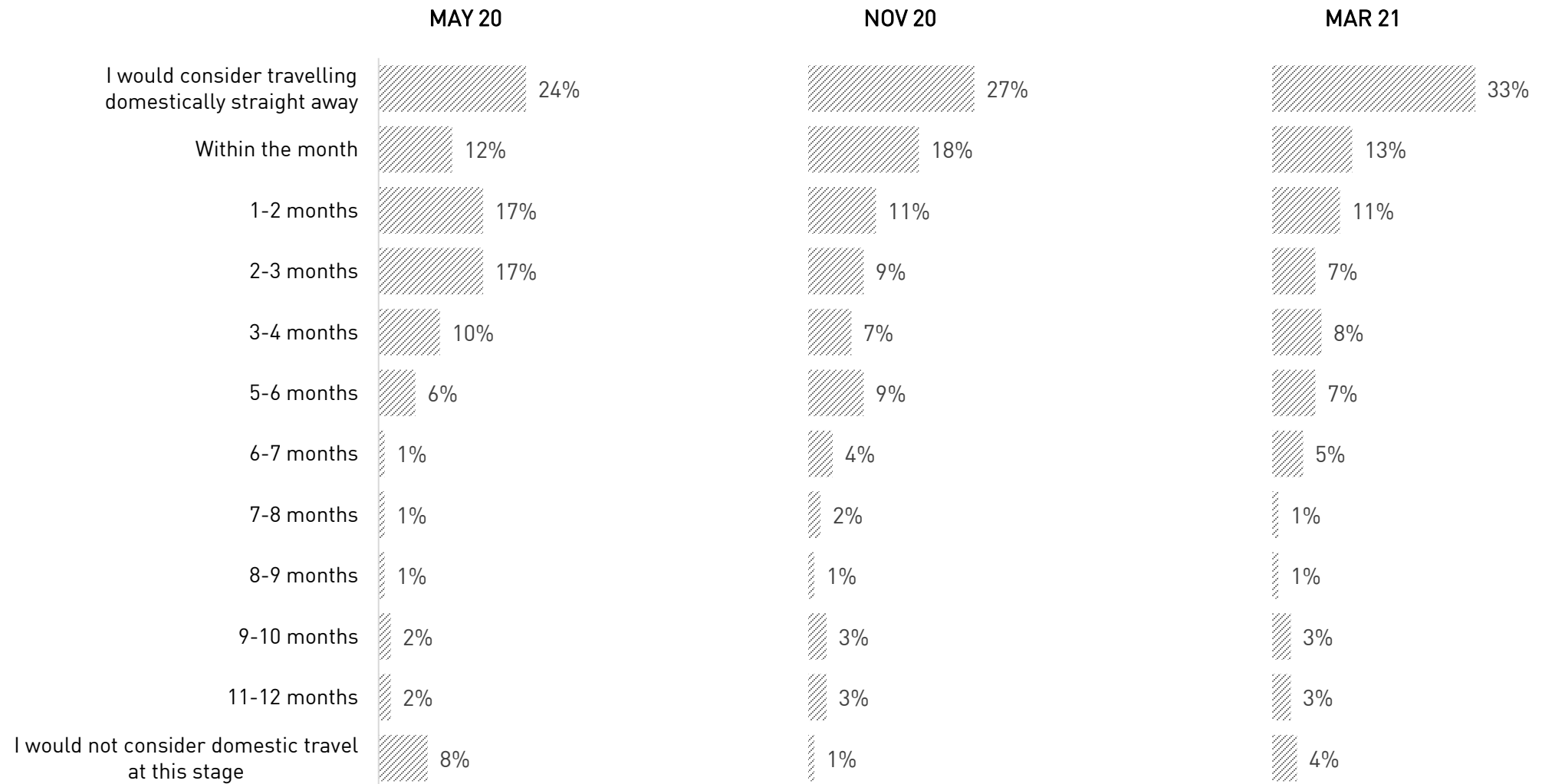
Base Domestic Travellers: May 20 (n=5,172); Nov 20 (n=2,467); Mar 21 (n=2,784)
 Q20-21. We would like you to read a list of statements that might describe how you think and feel in regard to the airport and travel.

FUTURE TRAVEL INTENTIONS

How much will we travel now that restrictions are easing?

FUTURE TRAVEL INTENTIONS

Traveller confidence is further increasing with domestic travel up by 6% since May 2020

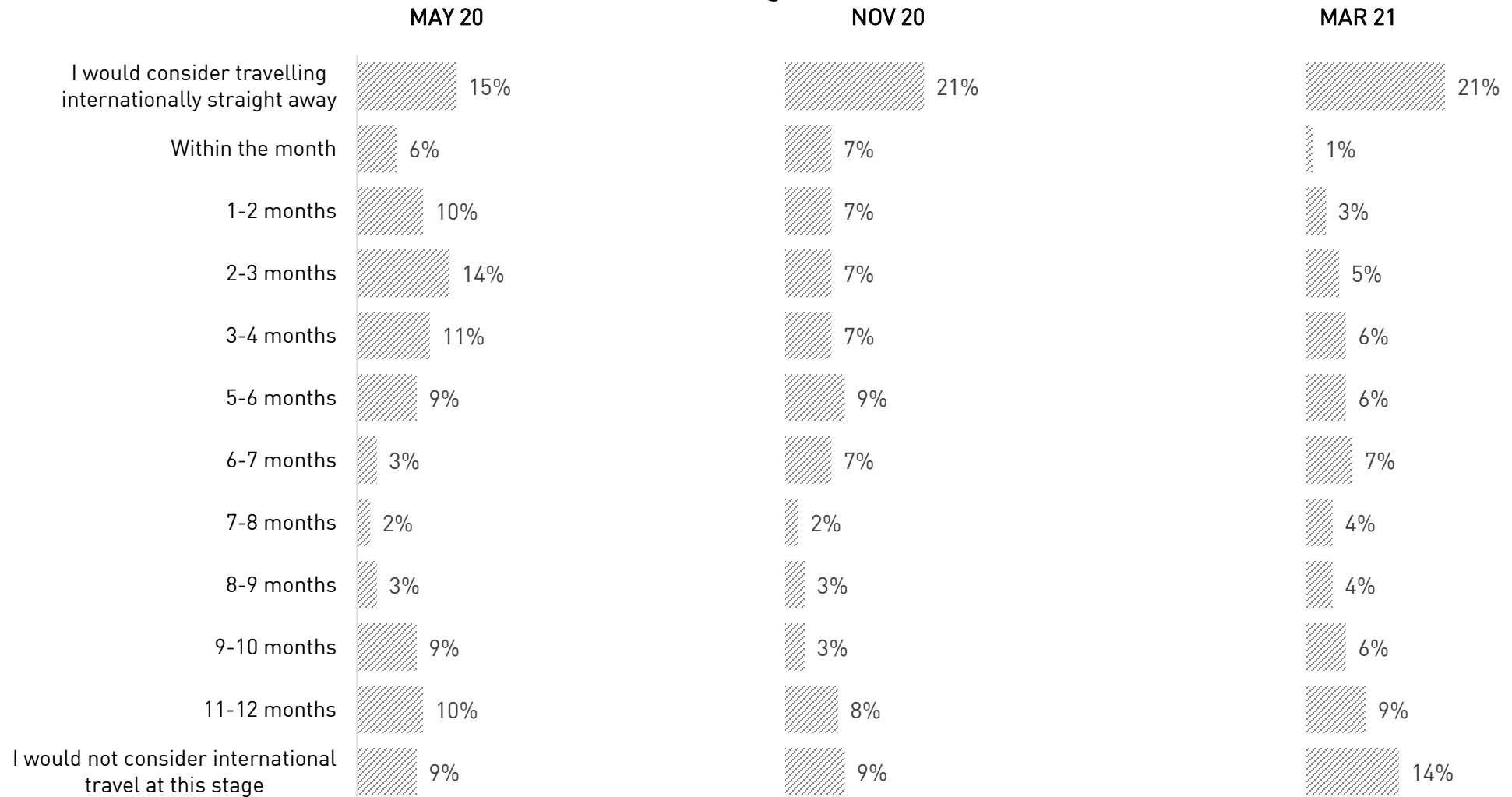


Base Domestic Travellers: May 20 (n=5,172); Nov 20 (n=2,467); Mar 21 (2,784)

Q26. Now that COVID-19 travel restrictions are easing at Melbourne Airport for Domestic travel, when would you consider flying next?

FUTURE TRAVEL INTENTIONS – INTERNATIONAL

14% of the international market would not consider travelling at this stage but a strong VFR market sees an immediate need for travel remaining consistent



Base International Travellers: May 20 (n=4,252); Nov 20 (n=2,380); Mar 21 (n=2,157)

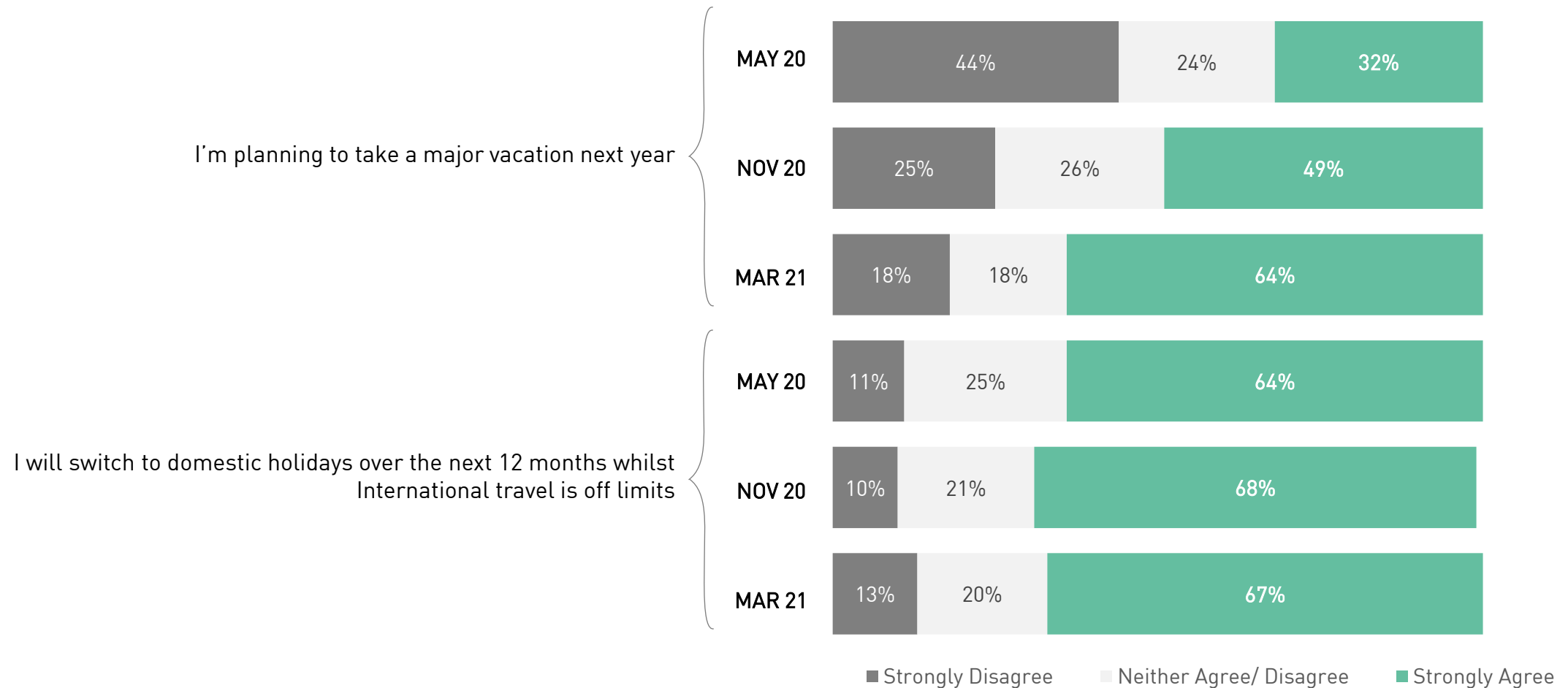
Q27. Now that COVID-19 travel restrictions are easing at Melbourne Airport for international travel, when would you consider flying next?

COVID-19 AND ITS IMPACT ON BEHAVIOUR

What is impacting our travellers

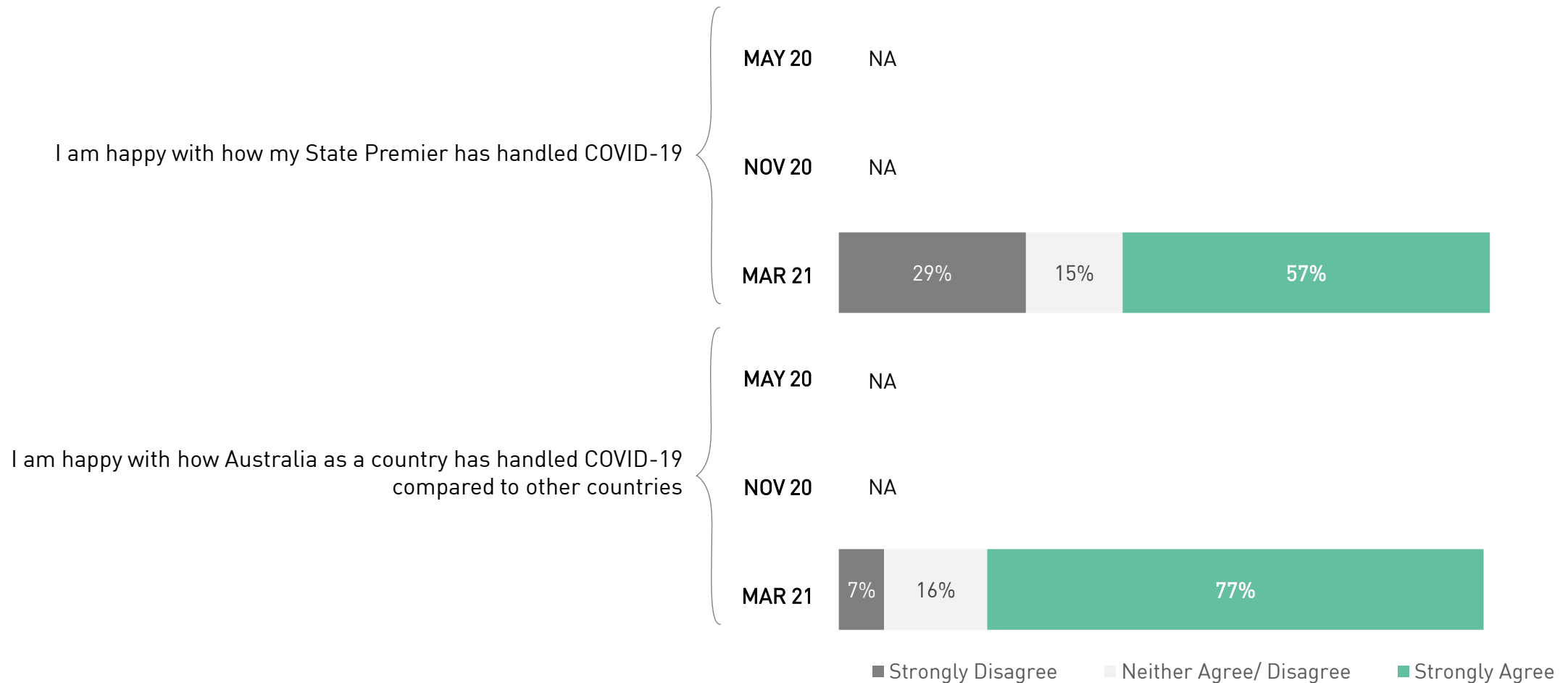
MINDSET AND ATTITUDES IN REGARD TO TRAVELLING

Travellers are looking to take a major vacation (up 15%) and looking to switch to domestic travel over the next 12 months while international travel is off limits (67%)



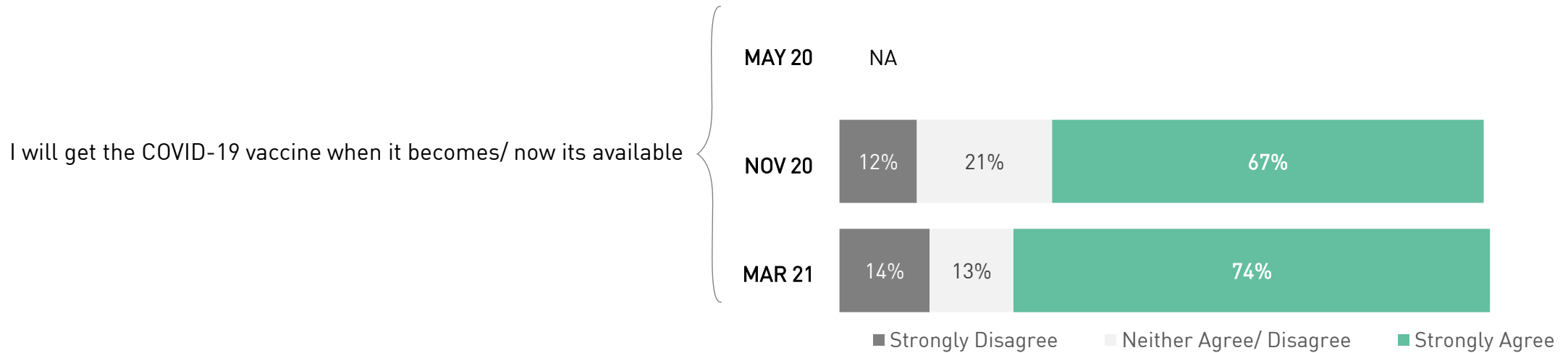
MINDSET AND ATTITUDES IN REGARD TO COVID-19

Melbourne and Australia has gained strong community sentiment in relation to how COVID-19 has been handled



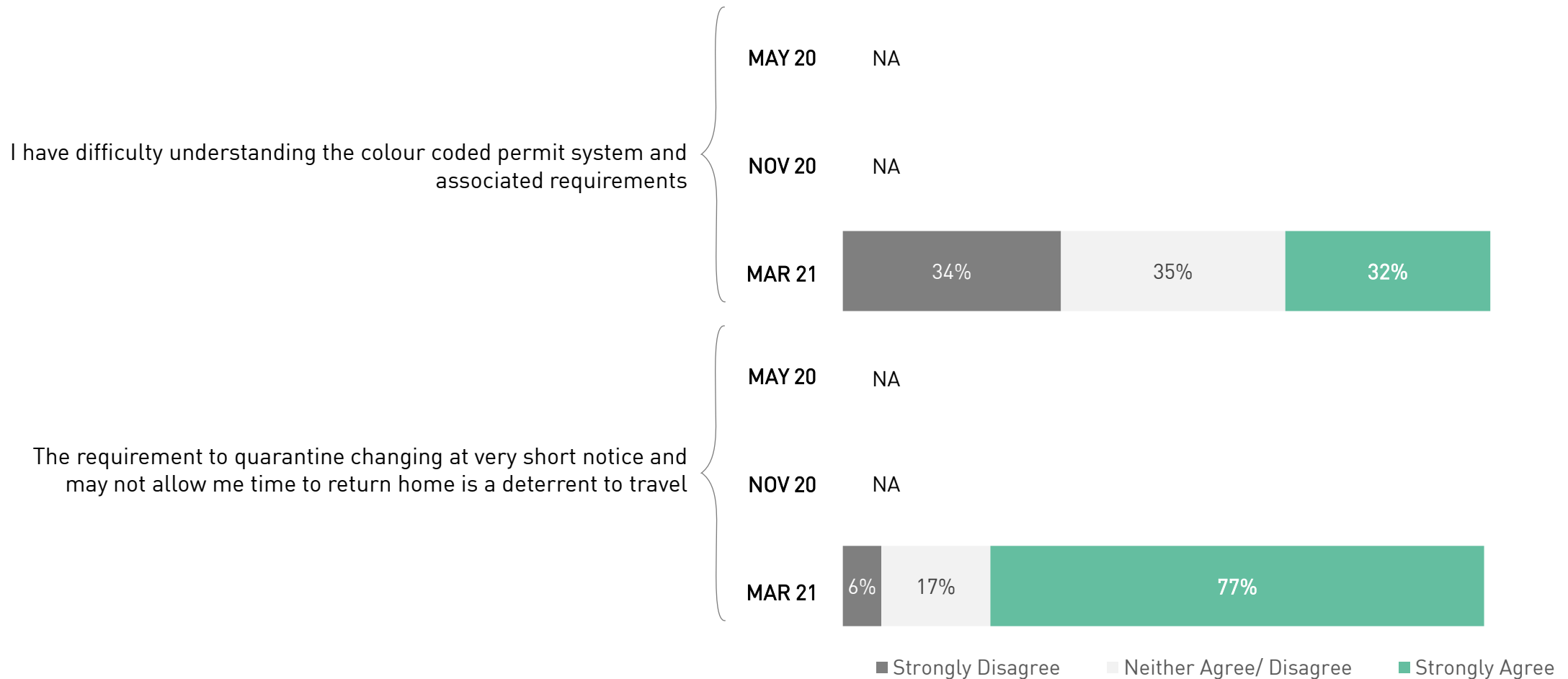
MINDSET AND ATTITUDES IN REGARD TO COVID-19

Community numbers to receive the COVID-19 vaccine has increased by 7%.



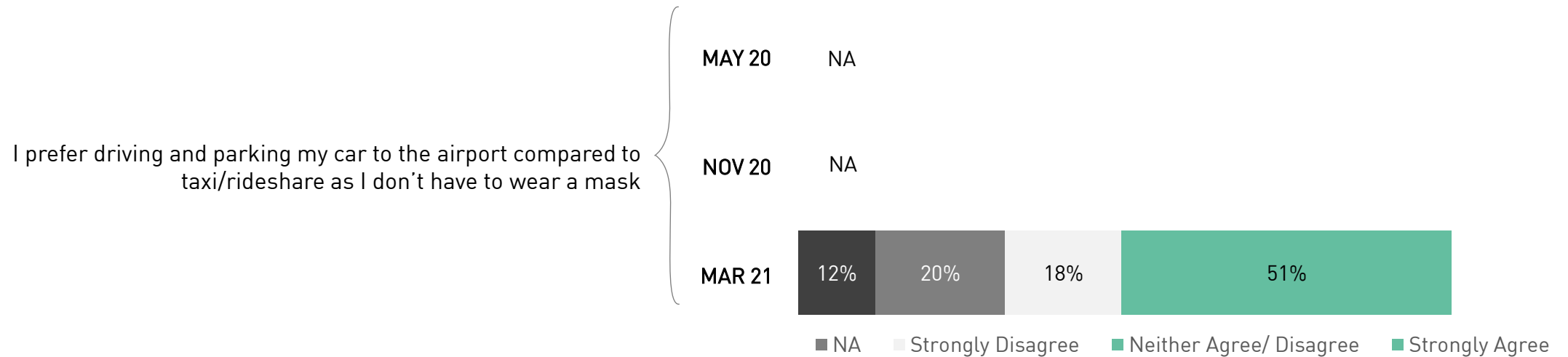
MINDSET AND ATTITUDES IN REGARD TO TRAVELLING

The uncertain nature of return travel and quarantine was a major deterrent to for travelling (77%)



MINDSET AND ATTITUDES IN REGARD TO PARKING

A big opportunity still exists for MELB Parking with the preference over rideshare due to not having to wear a mask



THINK you!

FOR FURTHER INFORMATION PLEASE CONTACT KRISTY IHLE

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