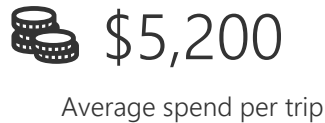
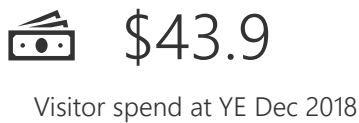
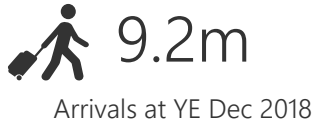




## MARKET OVERVIEW

Australia welcomed 9.2 million international visitors as at year ending December 2018. These visitors injected \$43.9 billion into the Australian economy. In 2018, total international aviation capacity to Australia grew by 4 per cent.

### VISITATION AND SPEND\*



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

### MARKET OPPORTUNITY

**80m+**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~40%**

of the total out of region travel market

\*\*see additional HVT factsheet for more information

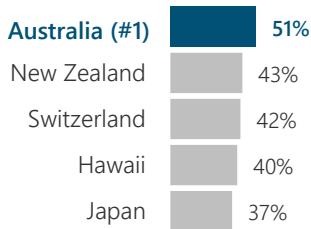
## MOTIVATIONS FOR TRAVEL

### DRIVERS OF DESTINATION CHOICE

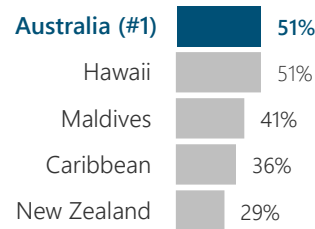
- #1 Safety & security
- #2 Nature & wildlife
- #3 Value for money
- #4 Food & wine
- #5 Friendly & welcoming

### AUSTRALIA'S PERFORMANCE

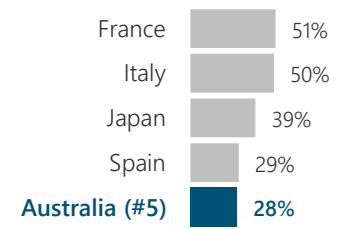
#### NATURE & WILDLIFE



#### AQUATIC & COASTAL



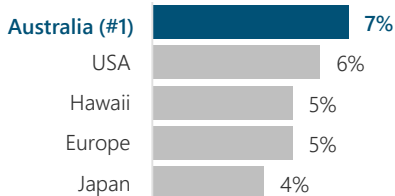
#### FOOD & WINE



## DEMAND FOR AUSTRALIA

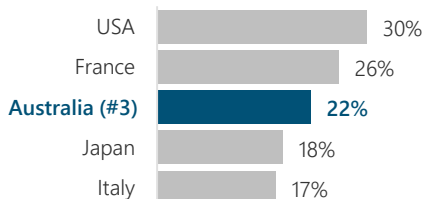
### DESIRABILITY

Unprompted responses



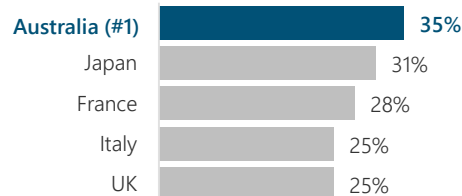
### FASHIONABILITY

Unprompted responses



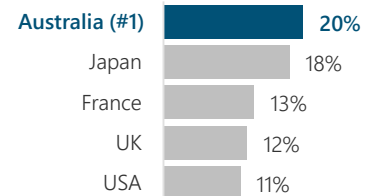
### CONSIDERATION

Prompted response list



### INTENTION

Prompted response list



## PLANNING AND BOOKING BEHAVIOUR

### LEAD TIME

#### PLAN

43% plan their trips



#### BOOK

38% book their trips



#### TRAVEL

Peak travel season



### BOOKING SOURCES

#### ONLINE VS OFFLINE



71% use one or more online booking sources



46% use one or more offline booking sources

#### DIRECT VS INDIRECT



55% use one or more direct booking sources



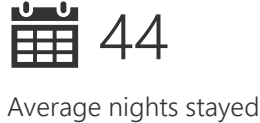
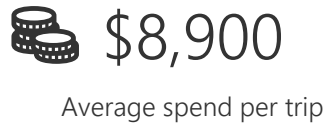
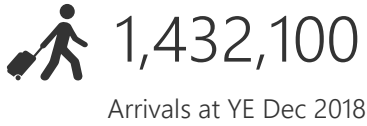
68% use one or more indirect booking sources



### MARKET OVERVIEW

In 2018, China was Australia's largest inbound market in terms of visitor arrivals and total visitor spend, making it one of Tourism Australia's most important source markets. Both arrivals and spend saw steady growth of 6% and 13% year-on-year respectively.

#### VISITATION AND SPEND\*



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

#### MARKET OPPORTUNITY

**20.4m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~41%**

of the total out of region travel market

\*\*see additional HVT factsheet for more information

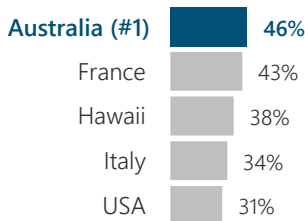
### MOTIVATIONS FOR TRAVEL

#### DRIVERS OF DESTINATION CHOICE

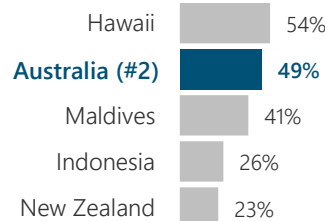
-  #1 Nature & wildlife
-  #2 Safety & security
-  #3 Food & wine
-  #4 Aquatic & coastal
-  #5 Romantic

#### AUSTRALIA'S PERFORMANCE

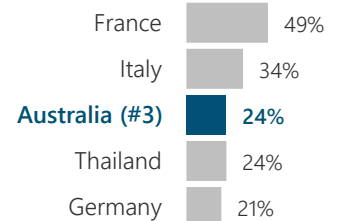
##### NATURE & WILDLIFE



##### AQUATIC & COASTAL



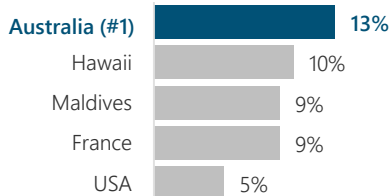
##### FOOD & WINE



### DEMAND FOR AUSTRALIA

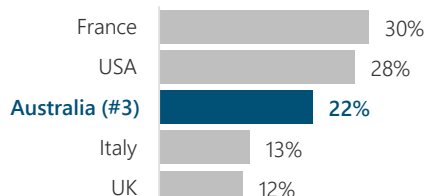
#### DESIRABILITY

*Unprompted responses*



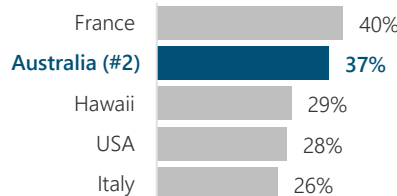
#### FASHIONABILITY

*Unprompted responses*



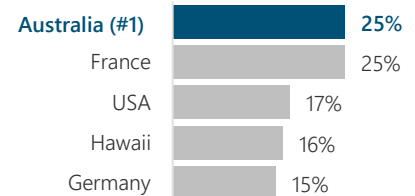
#### CONSIDERATION

*Prompted response list*



#### INTENTION

*Prompted response list*



### PLANNING AND BOOKING BEHAVIOUR

#### LEAD TIME

##### PLAN

51% plan their trips



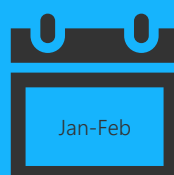
##### BOOK

49% book their trips



##### TRAVEL

Peak travel season



#### BOOKING SOURCES

##### ONLINE VS OFFLINE



76% use one or more online booking sources



48% use one or more offline booking sources

##### DIRECT VS INDIRECT



49% use one or more direct booking sources

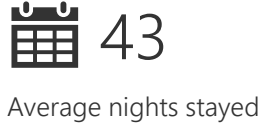
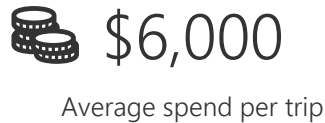
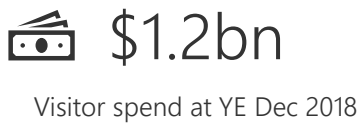
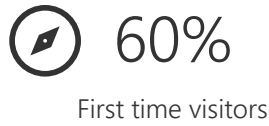
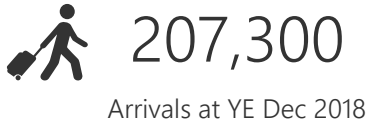


79% use one or more indirect booking sources



### MARKET OVERVIEW

Germany is one of Australia's most important source markets for youth, with around a third of travellers aged 15-29 years old. German travellers are also more likely to disperse further, with around a quarter of travellers visiting between 8 to 20 destinations within Australia.



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

**MARKET OPPORTUNITY**

**5.5m**  
Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~44%**  
of the total out of region travel market

\*\*see additional HVT factsheet for more information

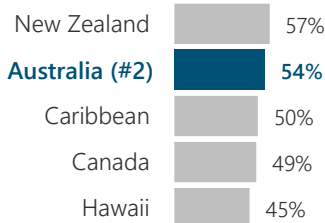
### MOTIVATIONS FOR TRAVEL

#### DRIVERS OF DESTINATION CHOICE

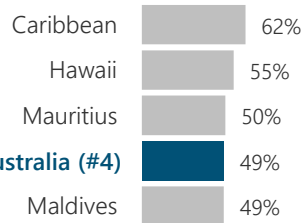
- #1 Nature & wildlife
- #2 Safety & security
- #3 Value for money
- #4 Friendly & welcoming
- #5 Aquatic & coastal

#### AUSTRALIA'S PERFORMANCE

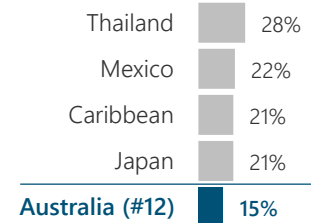
##### NATURE & WILDLIFE



##### AQUATIC & COASTAL



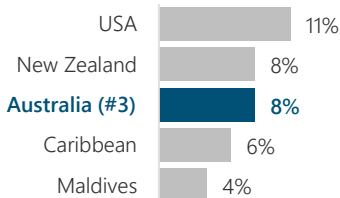
##### FOOD & WINE



### DEMAND FOR AUSTRALIA

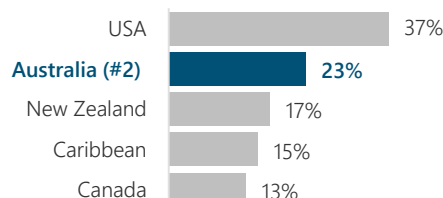
#### DESIRABILITY

Unprompted responses



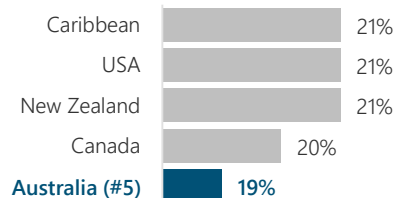
#### FASHIONABILITY

Unprompted responses



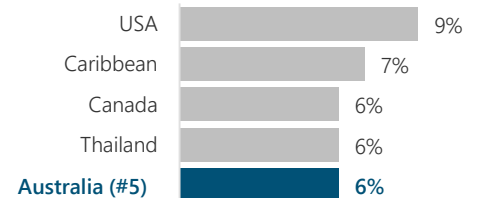
#### CONSIDERATION

Prompted response list



#### INTENTION

Prompted response list



### PLANNING AND BOOKING BEHAVIOUR

#### LEAD TIME

##### PLAN

57% plan their trips



##### BOOK

55% book their trips



##### TRAVEL

Peak travel season



#### BOOKING SOURCES

##### ONLINE VS OFFLINE



53% use one or more online booking sources



54% use one or more offline booking sources

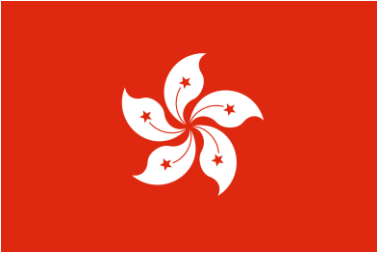
##### DIRECT VS INDIRECT



40% use one or more direct booking sources



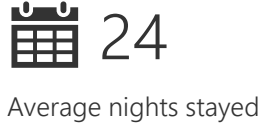
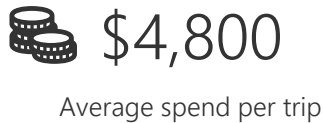
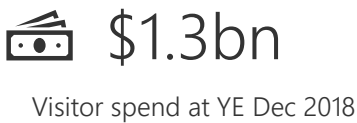
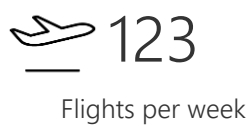
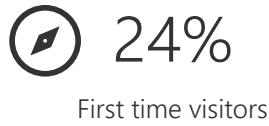
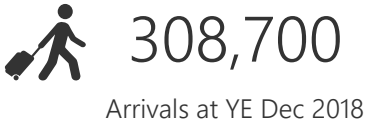
71% use one or more indirect booking sources



### MARKET OVERVIEW

In 2018, Hong Kong was Australia's second fastest growing source market in terms of visitor arrivals, growing 10% year-on-year.

#### VISITATION AND SPEND\*



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

#### MARKET OPPORTUNITY

**1.1m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~39%**

of the total out of region travel market

\*\*see additional HVT factsheet for more information

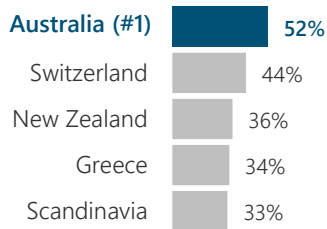
### MOTIVATIONS FOR TRAVEL

#### DRIVERS OF DESTINATION CHOICE

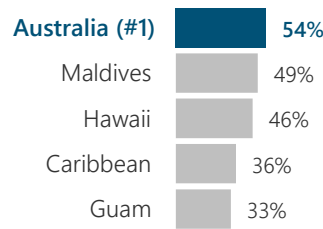
-  #1 Safety & security
-  #2 Nature & wildlife
-  #3 Food & wine
-  #4 Clean cities
-  #5 Value for money

#### AUSTRALIA'S PERFORMANCE

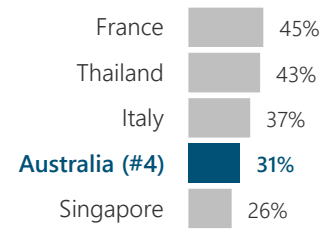
##### NATURE & WILDLIFE



##### AQUATIC & COASTAL



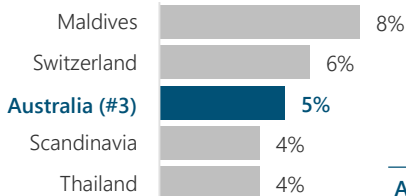
##### FOOD & WINE



### DEMAND FOR AUSTRALIA

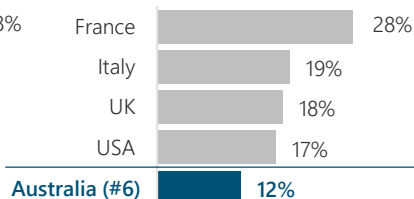
#### DESIRABILITY

Unprompted responses



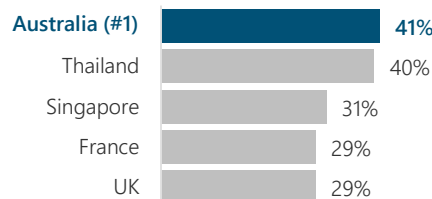
#### FASHIONABILITY

Unprompted responses



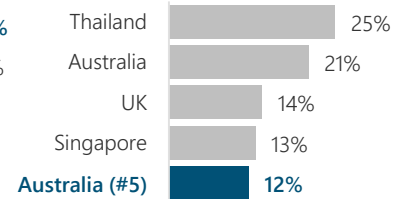
#### CONSIDERATION

Prompted response list



#### INTENTION

Prompted response list



### PLANNING AND BOOKING BEHAVIOUR

#### LEAD TIME

##### PLAN

39% plan their trips



##### BOOK

42% book their trips



##### TRAVEL

Peak travel season



#### BOOKING SOURCES

##### ONLINE VS OFFLINE



72% use one or more online booking sources



41% use one or more offline booking sources

##### DIRECT VS INDIRECT



57% use one or more direct booking sources



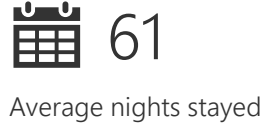
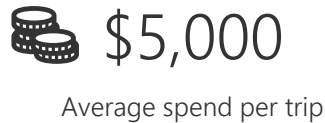
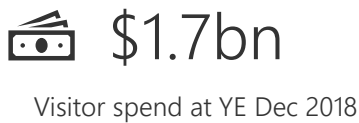
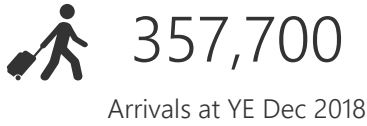
64% use one or more indirect booking sources

### MARKET OVERVIEW



In 2018, India was one of Australia's fastest growing inbound markets in terms of visitor arrivals, growing at 18% year-on-year. India's high average nights indicates a strong 'visiting friends and relatives' (VFR) market.

#### VISITATION AND SPEND\*



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

#### MARKET OPPORTUNITY

**2.7m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~39%**

of the total out of region travel market

\*\*see additional HVT factsheet for more information

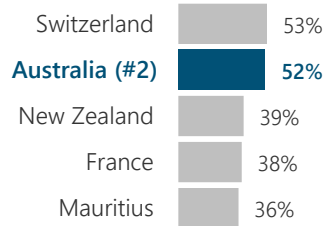
### MOTIVATIONS FOR TRAVEL

#### DRIVERS OF DESTINATION CHOICE

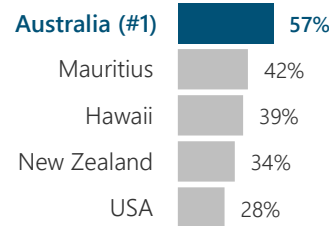
- #1 Nature & wildlife
- #2 Safety & security
- #3 Aquatic & coastal
- #4 Family friendly
- #5 Value for money

#### AUSTRALIA'S PERFORMANCE

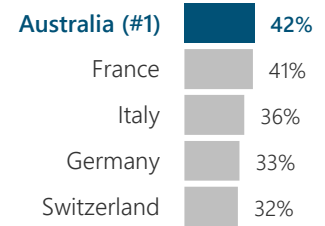
##### NATURE & WILDLIFE



##### AQUATIC & COASTAL



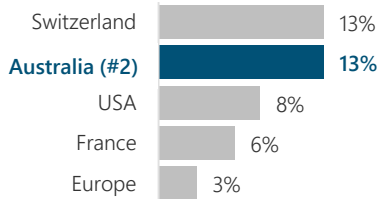
##### FOOD & WINE



### DEMAND FOR AUSTRALIA

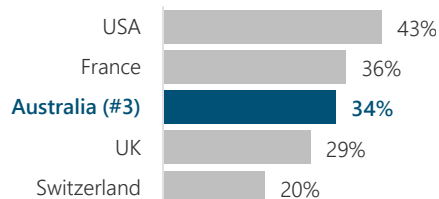
#### DESIRABILITY

Unprompted responses



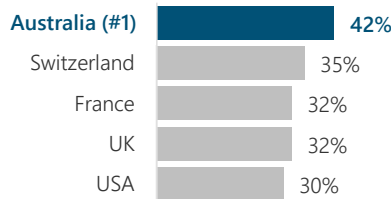
#### FASHIONABILITY

Unprompted responses



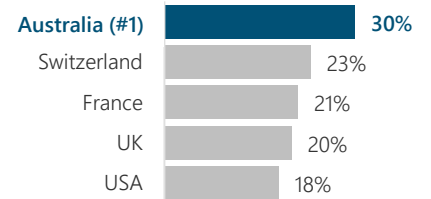
#### CONSIDERATION

Prompted response list



#### INTENTION

Prompted response list



### PLANNING AND BOOKING BEHAVIOUR

#### LEAD TIME

##### PLAN

38% plan their trips



##### BOOK

45% book their trips



##### TRAVEL

Peak travel season



#### BOOKING SOURCES

##### ONLINE VS OFFLINE



80% use one or more online booking sources



54% use one or more offline booking sources

##### DIRECT VS INDIRECT



68% use one or more direct booking sources

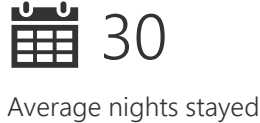
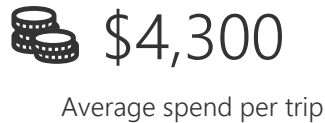
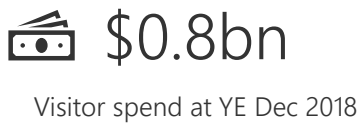
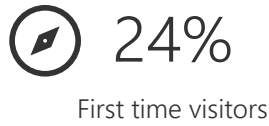
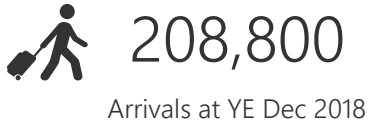


76% use one or more indirect booking sources



### MARKET OVERVIEW

In 2018, Indonesia was Australia's fastest growing market for visitor expenditure, up 14% year-on-year. Indonesia also sustained record levels of arrivals.



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

### MARKET OPPORTUNITY

**1.2m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~40%**

of the total out of region travel market

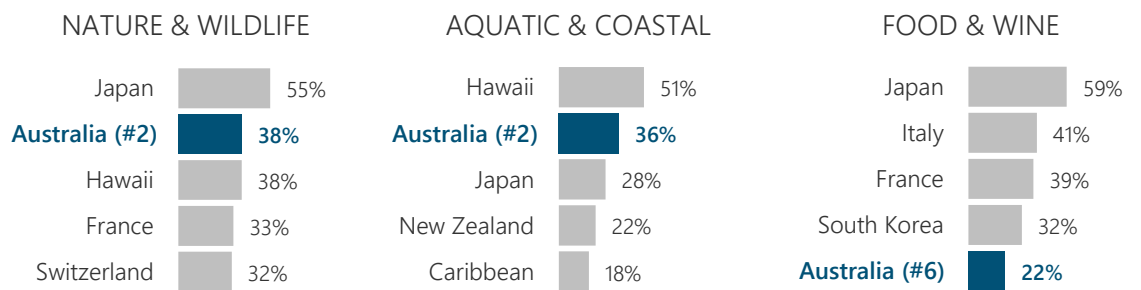
\*\*see additional HVT factsheet for more information

### MOTIVATIONS FOR TRAVEL

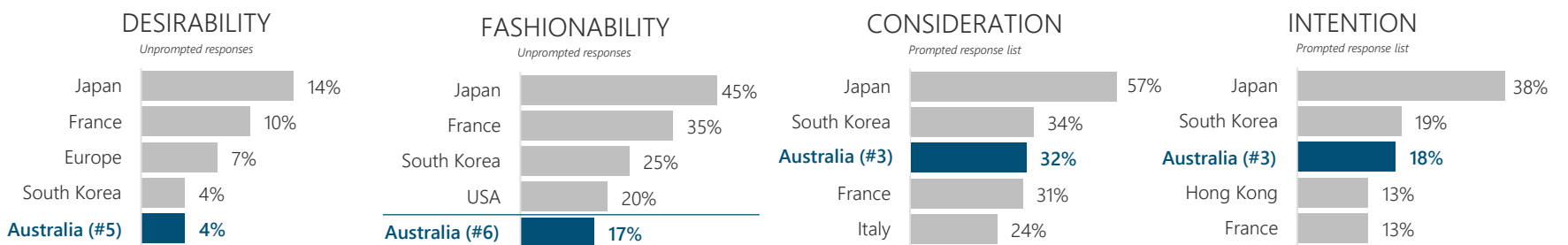
#### DRIVERS OF DESTINATION CHOICE

-  #1 Nature & wildlife
-  #2 Safety & security
-  #3 Clean cities
-  #4 Friendly & welcoming
-  #5 Family friendly

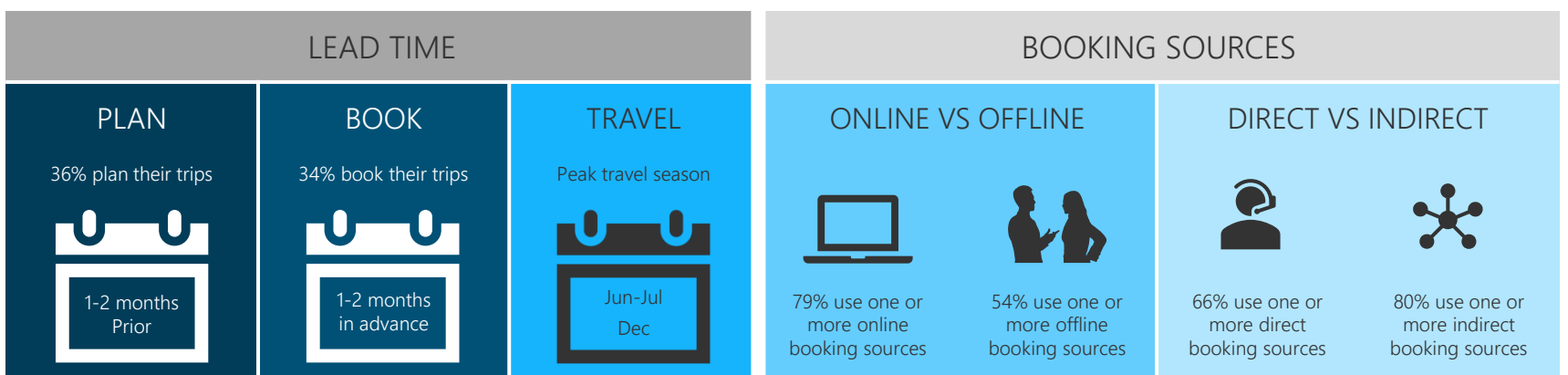
#### AUSTRALIA'S PERFORMANCE



### DEMAND FOR AUSTRALIA



### PLANNING AND BOOKING BEHAVIOUR



Source: Tourism Australia's Consumer Demand Project July 2018. Australian Bureau of Statistics, Overseas Arrivals and Departures, December 2018. Tourism Research Australia, International Visitor Survey, December 2018. Department of Infrastructure and Regional Development, December 2018

# TRAVELLER SNAPSHOT

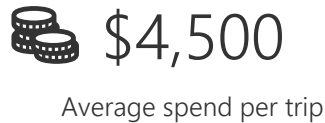
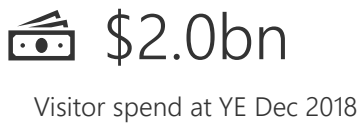
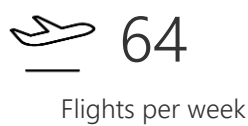
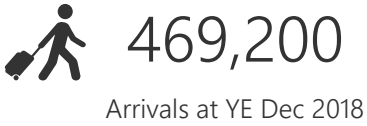
JAPAN



## MARKET OVERVIEW

Japan is Australia's fifth most valuable inbound market in terms of both visitor arrivals and total visitor spend. In 2018, Japan continued to show solid growth with arrivals up 8% and spend up 11% year-on-year.

### VISITATION AND SPEND\*



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

### MARKET OPPORTUNITY

**6.3m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~41%**

of the total out of region travel market

\*\*see additional HVT factsheet for more information

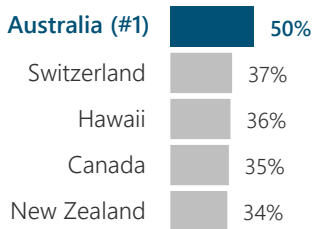
## MOTIVATIONS FOR TRAVEL

### DRIVERS OF DESTINATION CHOICE

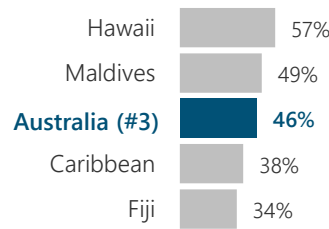
- #1 Food & wine
- #2 Safety & security
- #3 Nature & wildlife
- #4 Value for money
- #5 History & heritage

### AUSTRALIA'S PERFORMANCE

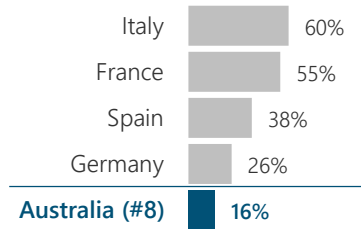
#### NATURE & WILDLIFE



#### AQUATIC & COASTAL



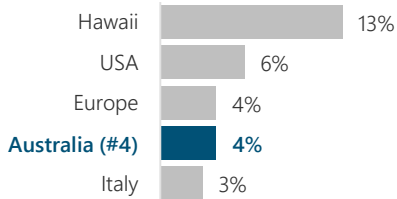
#### FOOD & WINE



## DEMAND FOR AUSTRALIA

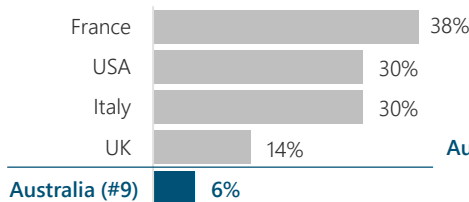
### DESIRABILITY

Unprompted responses



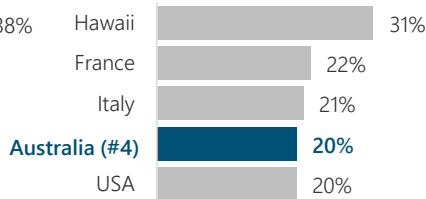
### FASHIONABILITY

Unprompted responses



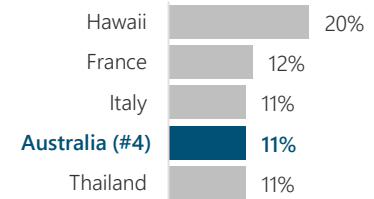
### CONSIDERATION

Prompted response list



### INTENTION

Prompted response list



## PLANNING AND BOOKING BEHAVIOUR

### LEAD TIME

#### PLAN

54% plan their trips



#### BOOK

46% book their trips



#### TRAVEL

Peak travel season



### BOOKING SOURCES

#### ONLINE VS OFFLINE

72% use one or more online booking sources



35% use one or more offline booking sources

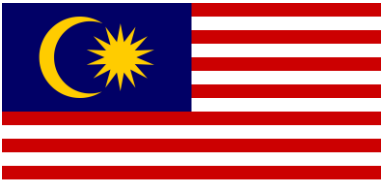
#### DIRECT VS INDIRECT



40% use one or more direct booking sources

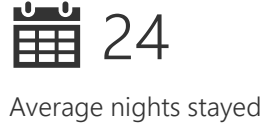
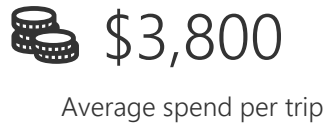
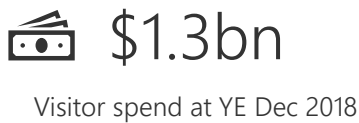
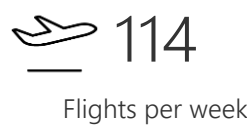
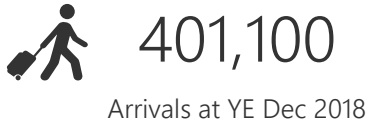


72% use one or more indirect booking sources



## MARKET OVERVIEW

Malaysia remains a steady inbound market for Australia and market share continues to improve year-on-year.



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

### MARKET OPPORTUNITY

**1.5m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~37%**

of the total out of region travel market

\*\*see additional HVT factsheet for more information

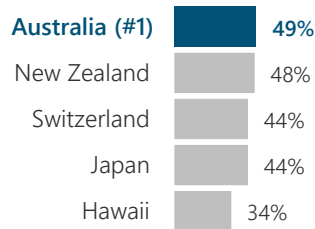
## MOTIVATIONS FOR TRAVEL

### DRIVERS OF DESTINATION CHOICE

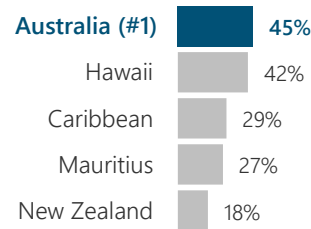
- #1 Safety & security
- #2 Nature & wildlife
- #3 Value for money
- #4 Family friendly
- #5 Clean cities

### AUSTRALIA'S PERFORMANCE

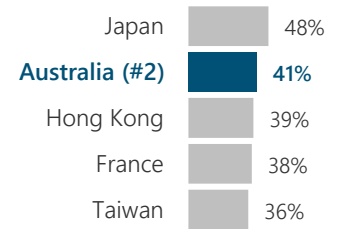
#### NATURE & WILDLIFE



#### AQUATIC & COASTAL



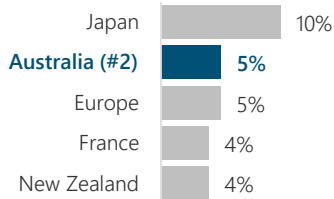
#### FOOD & WINE



## DEMAND FOR AUSTRALIA

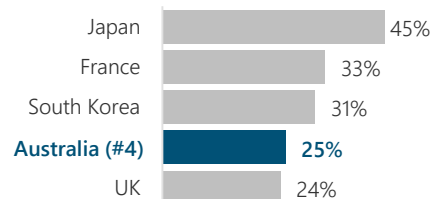
### DESIRABILITY

Unprompted responses



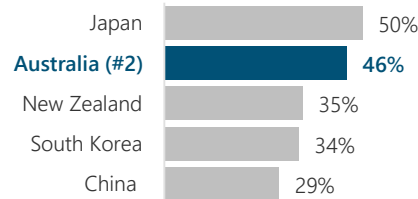
### FASHIONABILITY

Unprompted responses



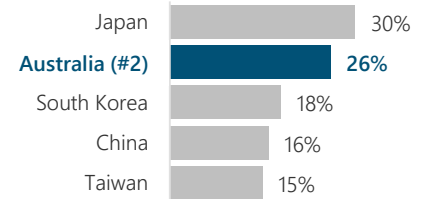
### CONSIDERATION

Prompted response list



### INTENTION

Prompted response list



## PLANNING AND BOOKING BEHAVIOUR

### LEAD TIME

#### PLAN

47% plan their trips



#### BOOK

39% book their trips



#### TRAVEL

Peak travel season



### BOOKING SOURCES

#### ONLINE VS OFFLINE

74% use one or more online booking sources



50% use one or more offline booking sources

#### DIRECT VS INDIRECT

69% use one or more direct booking sources



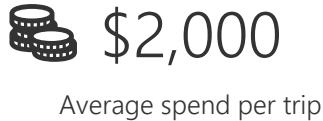
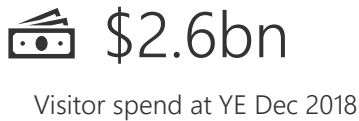
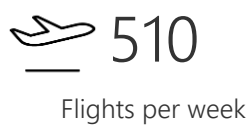
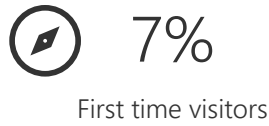
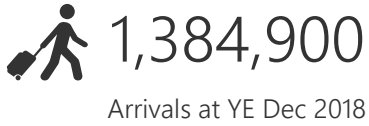
64% use one or more indirect booking sources





### MARKET OVERVIEW

In 2018, New Zealand was Australia's second largest inbound market for visitor arrivals and fourth largest market for total visitor spend. As of July 2015, Tourism Australia's activity in New Zealand is focused on Business Events consumers only.



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

#### MARKET OPPORTUNITY

**1.2m**  
Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~38%**  
of the total out of region travel market

\*\*see additional HVT factsheet for more information

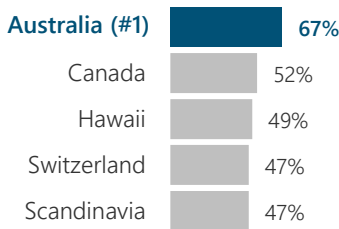
### MOTIVATIONS FOR TRAVEL

#### DRIVERS OF DESTINATION CHOICE

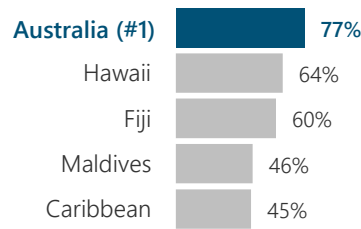
- #1 Safety & security
- #2 Value for money
- #3 Nature & wildlife
- #4 Friendly & welcoming
- #5 History & heritage

#### AUSTRALIA'S PERFORMANCE

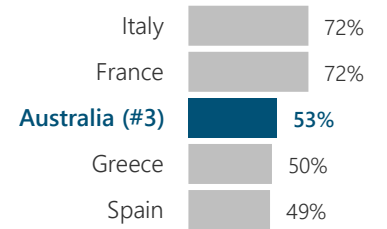
##### NATURE & WILDLIFE



##### AQUATIC & COASTAL



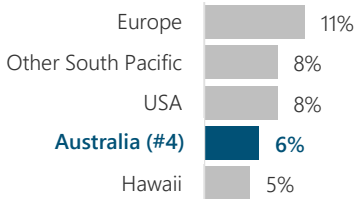
##### FOOD & WINE



### DEMAND FOR AUSTRALIA

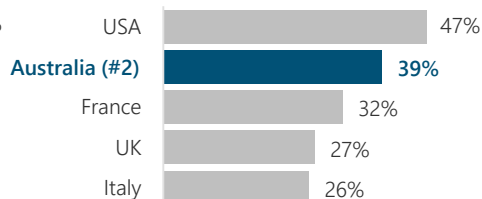
#### DESIRABILITY

Unprompted responses



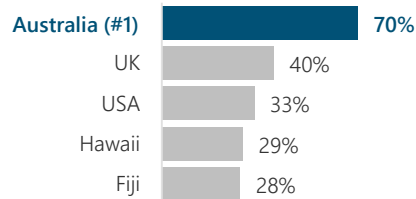
#### FASHIONABILITY

Unprompted responses



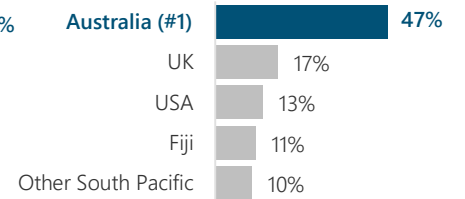
#### CONSIDERATION

Prompted response list



#### INTENTION

Prompted response list



### PLANNING AND BOOKING BEHAVIOUR

#### LEAD TIME

##### PLAN

46% plan their trips



##### BOOK

48% book their trips



##### TRAVEL

Peak travel season



#### BOOKING SOURCES

##### ONLINE VS OFFLINE



66% use one or more online booking sources



45% use one or more offline booking sources

##### DIRECT VS INDIRECT



58% use one or more direct booking sources



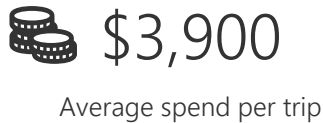
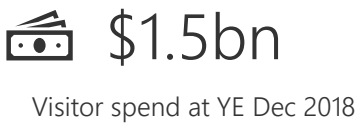
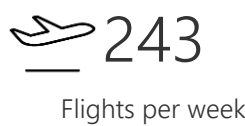
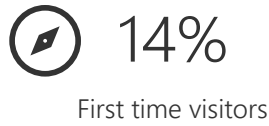
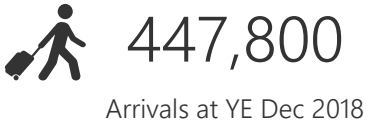
57% use one or more indirect booking sources



### MARKET OVERVIEW

Singapore continues to be an important inbound travel market for Australia. The market is supported by a strong supply of direct flights and around 83% of visitors each year have previously travelled to Australia.

#### VISITATION AND SPEND\*



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

#### MARKET OPPORTUNITY

**1.4m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~35%**

of the total out of region travel market

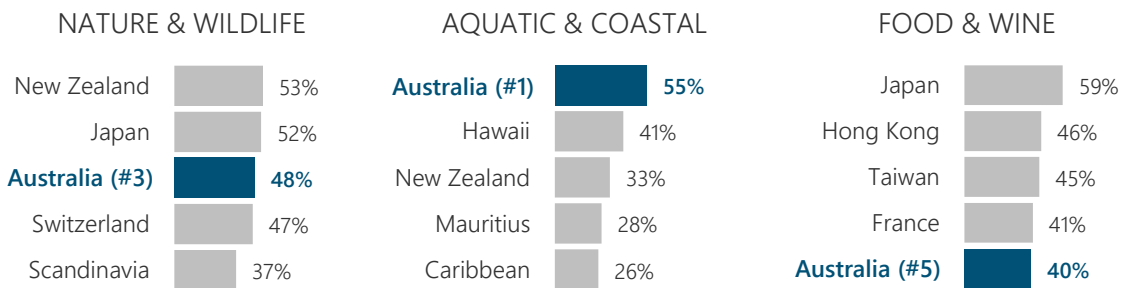
\*\*see additional HVT factsheet for more information

### MOTIVATIONS FOR TRAVEL

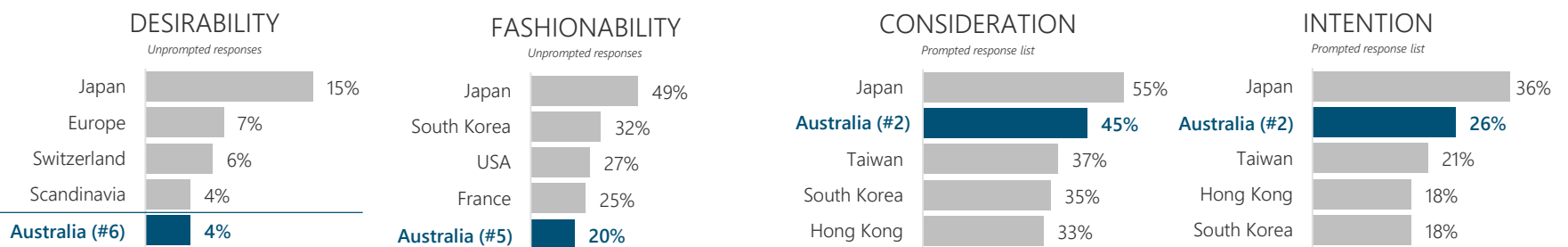
#### DRIVERS OF DESTINATION CHOICE

- #1 Safety & security
- #2 Value for money
- #3 Nature & wildlife
- #4 Friendly & welcoming
- #5 Food & wine

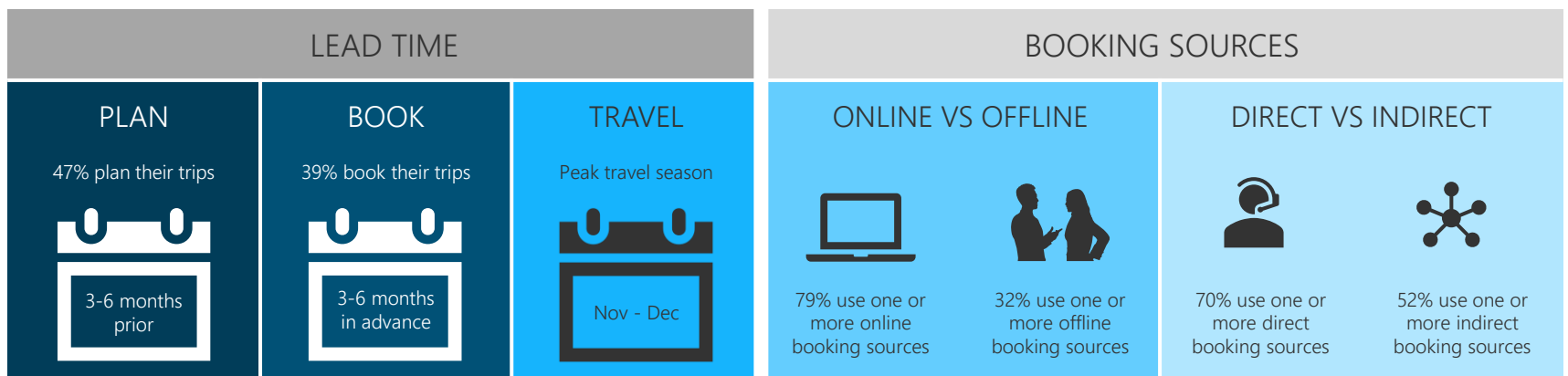
#### AUSTRALIA'S PERFORMANCE



### DEMAND FOR AUSTRALIA



### PLANNING AND BOOKING BEHAVIOUR

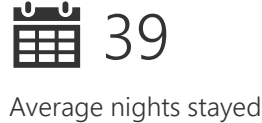
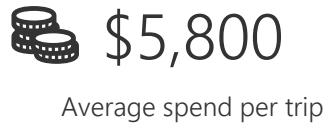
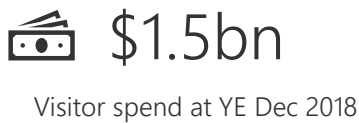
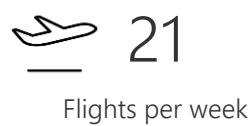
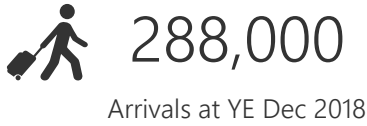


Source: Tourism Australia's Consumer Demand Project July 2018. Australian Bureau of Statistics, Overseas Arrivals and Departures, December 2018. Tourism Research Australia, International Visitor Survey, December 2018. Department of Infrastructure and Regional Development, December 2018



### MARKET OVERVIEW

South Korea remains a steady inbound market for Australia and market share continues to improve year-on-year.



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

### MARKET OPPORTUNITY

**7m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~43%**

of the total out of region travel market

\*\*see additional HVT factsheet for more information

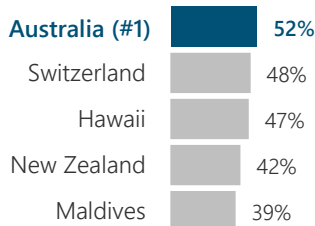
### MOTIVATIONS FOR TRAVEL

#### DRIVERS OF DESTINATION CHOICE

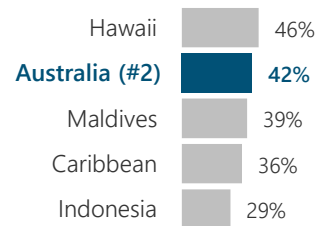
-  #1 Nature & wildlife
-  #2 Safety & security
-  #3 Food & wine
-  #4 Value for money
-  #5 History & heritage

#### AUSTRALIA'S PERFORMANCE

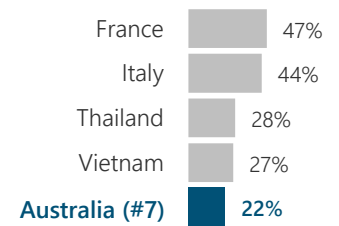
##### NATURE & WILDLIFE



##### AQUATIC & COASTAL



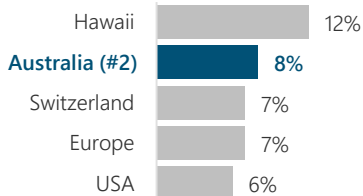
##### FOOD & WINE



### DEMAND FOR AUSTRALIA

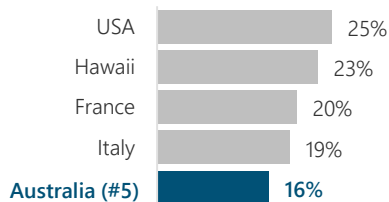
#### DESIRABILITY

Unprompted responses



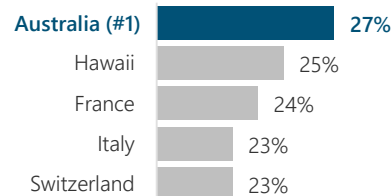
#### FASHIONABILITY

Unprompted responses



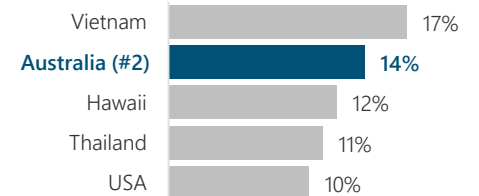
#### CONSIDERATION

Prompted response list



#### INTENTION

Prompted response list



### PLANNING AND BOOKING BEHAVIOUR

#### LEAD TIME

##### PLAN

45% plan their trips



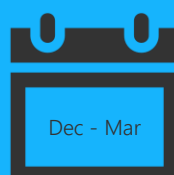
##### BOOK

48% book their trips



##### TRAVEL

Peak travel season



#### BOOKING SOURCES

##### ONLINE VS OFFLINE



68% use one or more online booking sources



44% use one or more offline booking sources

##### DIRECT VS INDIRECT



41% use one or more direct booking sources

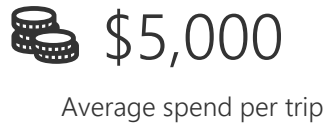
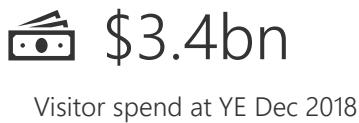
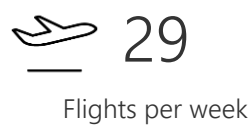
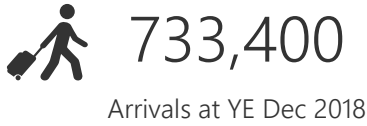


75% use one or more indirect booking sources



## MARKET OVERVIEW

In 2018, the United Kingdom was Australia's fourth largest inbound market for visitor arrivals and the third largest market for total visitor spend, making it one of Tourism Australia's most important source markets.



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

### MARKET OPPORTUNITY

**7.9m**

Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~41%**

of the total out of region travel market

\*\*see additional HVT factsheet for more information

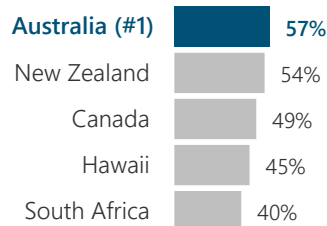
## MOTIVATIONS FOR TRAVEL

### DRIVERS OF DESTINATION CHOICE

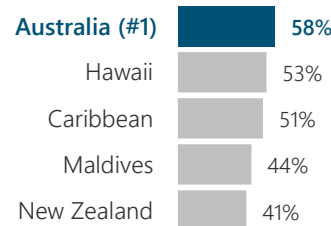
- #1 Safety & security
- #2 Nature & wildlife
- #3 Value for money
- #4 Food & wine
- #5 Friendly & welcoming

### AUSTRALIA'S PERFORMANCE

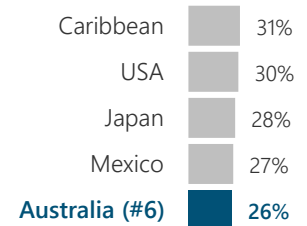
#### NATURE & WILDLIFE



#### AQUATIC & COASTAL



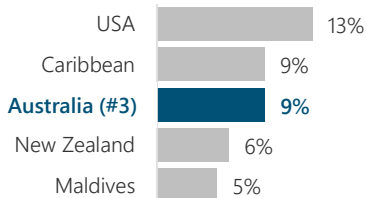
#### FOOD & WINE



## DEMAND FOR AUSTRALIA

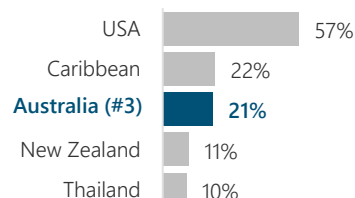
### DESIRABILITY

Unprompted responses



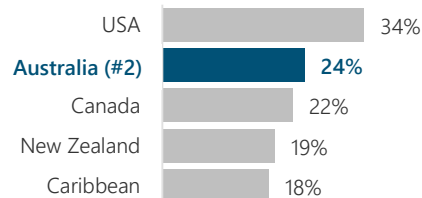
### FASHIONABILITY

Unprompted responses



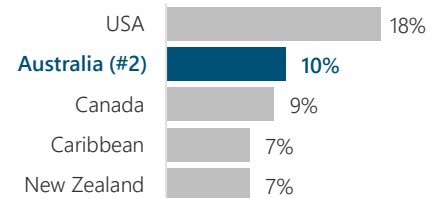
### CONSIDERATION

Prompted response list



### INTENTION

Prompted response list



## PLANNING AND BOOKING BEHAVIOUR

### LEAD TIME

#### PLAN

46% plan their trips



#### BOOK

46% book their trips



#### TRAVEL

Peak travel season



### BOOKING SOURCES

#### ONLINE VS OFFLINE



64% use one or more online booking sources



46% use one or more offline booking sources

#### DIRECT VS INDIRECT



47% use one or more direct booking sources

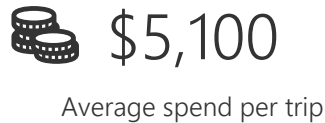
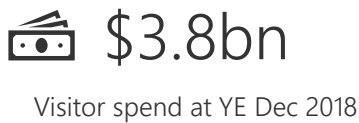
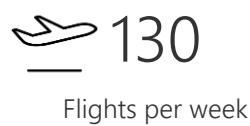
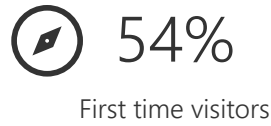
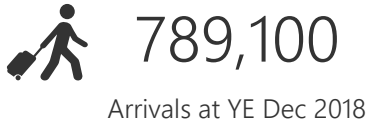


66% use one or more indirect booking sources



### MARKET OVERVIEW

In 2018, the USA was Australia's third largest inbound market for visitor arrivals and the second largest market for total visitor spend, making it one of Tourism Australia's most important source markets.



\*visit [tourism.australia.com](http://tourism.australia.com) for latest statistics

**MARKET OPPORTUNITY**

**24.3m**  
Estimated number of High Value Travellers (HVTs)\*\*

Representing  
**~40%**  
of the total out of region travel market

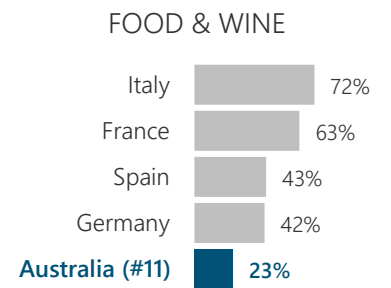
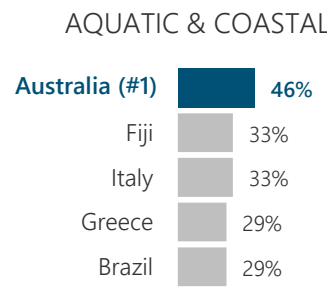
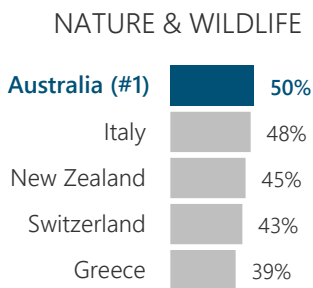
\*\*see additional HVT factsheet for more information

### MOTIVATIONS FOR TRAVEL

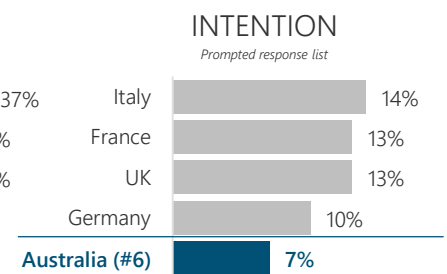
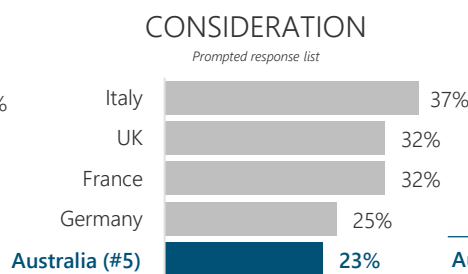
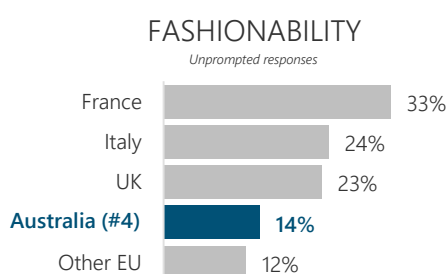
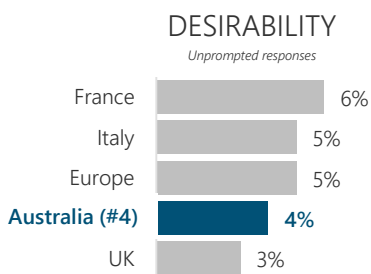
#### DRIVERS OF DESTINATION CHOICE

- #1 Safety & security
- #2 Nature & wildlife
- #3 Food & wine
- #4 Value for money
- #5 Friendly & welcoming

#### AUSTRALIA'S PERFORMANCE



### DEMAND FOR AUSTRALIA



### PLANNING AND BOOKING BEHAVIOUR

| LEAD TIME  |   |   | BOOKING SOURCES  |  |
|--|---|---|--|--|
| <p><b>PLAN</b></p> <p>46% plan their trips</p> <p>3-6 months prior</p> | <p><b>BOOK</b></p> <p>45% book their trips</p> <p>3-6 months in advance</p> | <p><b>TRAVEL</b></p> <p>Peak travel season</p> <p>Dec-Mar</p> | <p><b>ONLINE VS OFFLINE</b></p> <p>65% use one or more online booking sources</p> <p>49% use one or more offline booking sources</p> | <p><b>DIRECT VS INDIRECT</b></p> <p>56% use one or more direct booking sources</p> <p>60% use one or more indirect booking sources</p> |

Source: Tourism Australia's Consumer Demand Project July 2018. Australian Bureau of Statistics, Overseas Arrivals and Departures, December 2018. Tourism Research Australia, International Visitor Survey, December 2018. Department of Infrastructure and Regional Development, December 2018