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*
- 9.2m Arrivals at YE Dec 2018
- 39% First time visitors
- 1,909 Flights per week
- $43.9 Visitor spend at YE Dec 2018
- $5,200 Average spend per trip
- 32 Average nights stayed

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
- Australia (#1) 51%
- New Zealand 43%
- Switzerland 42%
- Hawaii 41%
- Japan 40%

AQUATIC & COASTAL
- Australia (#1) 51%
- Hawaii 41%
- Maldives 36%
- Caribbean 34%
- New Zealand 29%

FOOD & WINE
- France 51%
- Italy 50%
- Japan 39%
- Spain 29%
- Australia (#5) 28%

DESIRABILITY
- Unprompted responses

- Australia (#1) 7%
- USA 6%
- Hawaii 5%
- Europe 5%
- Japan 4%

DEMAND FOR AUSTRALIA

FASHIONABILITY
- Unprompted responses

- USA 30%
- France 26%
- Australia (#3) 22%
- Japan 19%
- Italy 17%

CONSIDERATION
- Prompted response list

- Australia (#1) 35%
- Japan 31%
- France 28%
- Italy 25%
- UK 25%

INTENTION
- Prompted response list

- Australia (#1) 20%
- Japan 18%
- France 13%
- UK 12%
- USA 11%

PLAN AND BOOKING BEHAVIOUR

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME
- PLAN
  - 43% plan their trips
  - 3-6 months prior
- BOOK
  - 38% book their trips
  - 3-6 months in advance
- TRAVEL
  - Peak travel season
  - February, December

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

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.

**LEAD TIME**

<table>
<thead>
<tr>
<th>PLAN</th>
<th>BOOK</th>
<th>TRAVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>51% plan their trips</td>
<td>49% book their trips</td>
<td>Peak travel season: Jan-Feb</td>
</tr>
</tbody>
</table>

**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.

**VISITATION AND SPEND**

- **1,432,100** Arrivals at YE Dec 2018
- **33%** First time visitors
- **189** Flights per week
- **$11.7bn** Visitor spend at YE Dec 2018
- **$8,900** Average spend per trip
- **44** Average nights stayed

**MARKET OPPORTUNITY**

- **20.4m** Estimated number of High Value Travellers (HVTs)**
- Representing ~41% of the total out of region travel market

**MARKET OVERVIEW**

**DRIVERS OF DESTINATION CHOICE**

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

**AUSTRALIA’S PERFORMANCE**

- **30%** 
- **28%** 
- **26%** 
- **24%** 
- **23%**

**DEMAND FOR AUSTRALIA**

- **13%**
- **10%**
- **9%**
- **9%**
- **5%**

**PLANNING AND BOOKING BEHAVIOUR**

**FASHIONABILITY**

- **Australia (#1)**
- **France**
- **USA**
- **Australia (#2)**
- **Italy**
- **UK**

**CONSIDERATION**

- **Australia (#1)**
- **France**
- **USA**
- **Australia (#2)**
- **Italy**
- **UK**

**INTENTION**

- **Australia (#1)**
- **France**
- **USA**
- **Australia (#2)**
- **Italy**
- **UK**

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.

VISITATION AND SPEND*

- **207,300** Arrivals at YE Dec 2018
- **60%** First time visitors
- **$1.2bn** Visitor spend at YE Dec 2018
- **$6,000** Average spend per trip
- **43** Average nights stayed

*visit 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

**drivers of destination choice**

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

DRIVERS OF DESTINATION CHOICE

**Motivations for travel**

- **57%** plan their trips 3-6 months prior
- **55%** book their trips 3-6 months in advance
- **53%** use one or more online booking sources
- **54%** use one or more offline booking sources
- **40%** use one or more direct booking sources
- **71%** use one or more indirect booking sources

DEMAND FOR AUSTRALIA

**Drivers of destination choice**

<table>
<thead>
<tr>
<th>Nature &amp; Wildlife</th>
<th>Aquatic &amp; Coastal</th>
<th>Food &amp; Wine</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Zealand</td>
<td>Caribbean</td>
<td>Thailand</td>
</tr>
<tr>
<td>Australia (#2)</td>
<td>57%</td>
<td>28%</td>
</tr>
<tr>
<td>Australia</td>
<td>54%</td>
<td>Costa Rica</td>
</tr>
<tr>
<td>Canada</td>
<td>50%</td>
<td>Mexico</td>
</tr>
<tr>
<td>Mauritius</td>
<td>50%</td>
<td>Caribbean</td>
</tr>
<tr>
<td>Maldives</td>
<td>49%</td>
<td>Japan</td>
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</table>

**Fashionability**

<table>
<thead>
<tr>
<th>Country</th>
<th>Unprompted responses</th>
<th>Prompted response list</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>11%</td>
<td>37%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>8%</td>
<td>17%</td>
</tr>
<tr>
<td>Australia (#2)</td>
<td>8%</td>
<td>20%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>6%</td>
<td>15%</td>
</tr>
<tr>
<td>Maldives</td>
<td>4%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Consideration**

<table>
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<tr>
<th>Region</th>
<th>Unprompted responses</th>
<th>Prompted response list</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caribbean</td>
<td>23%</td>
<td>21%</td>
</tr>
<tr>
<td>USA</td>
<td>17%</td>
<td>21%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>15%</td>
<td>21%</td>
</tr>
<tr>
<td>Canada</td>
<td>13%</td>
<td>20%</td>
</tr>
<tr>
<td>Australia (#5)</td>
<td>19%</td>
<td>19%</td>
</tr>
</tbody>
</table>

**Intention**

<table>
<thead>
<tr>
<th>Country</th>
<th>Unprompted responses</th>
<th>Prompted response list</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>11%</td>
<td>9%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Australia (#2)</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Canada</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Thailand</td>
<td>6%</td>
<td>7%</td>
</tr>
<tr>
<td>Australia (#5)</td>
<td>6%</td>
<td>7%</td>
</tr>
</tbody>
</table>

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*

- **308,700** Arrivals at YE Dec 2018
- **24%** First time visitors
- **$1.3bn** Visitor spend at YE Dec 2018
- **123** Flights per week
- **$4,800** Average spend per trip
- **24** Average nights stayed

*visit 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

<table>
<thead>
<tr>
<th>Nature &amp; Wildlife</th>
<th>Aquatic &amp; Coastal</th>
<th>Food &amp; Wine</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia (#1)</td>
<td>Australia (#1)</td>
<td>France</td>
</tr>
<tr>
<td>Switzerland</td>
<td>Maldives</td>
<td>Thailand</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Hawaii</td>
<td>Italy</td>
</tr>
<tr>
<td>Greece</td>
<td>Caribbean</td>
<td>Australia (#4)</td>
</tr>
<tr>
<td>Scandinavia</td>
<td>Guam</td>
<td>Singapore</td>
</tr>
</tbody>
</table>

DEMAND FOR AUSTRALIA

<table>
<thead>
<tr>
<th>Desirability</th>
<th>Fashionability</th>
<th>Consideration</th>
<th>Intention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maldives</td>
<td>8% Unprompted responses</td>
<td>Australia (#1)</td>
<td>Thailand</td>
</tr>
<tr>
<td>Switzerland</td>
<td>6% Unprompted responses</td>
<td></td>
<td>Australia</td>
</tr>
<tr>
<td>Australia (#3)</td>
<td>5% Unprompted responses</td>
<td></td>
<td>UK</td>
</tr>
<tr>
<td>Scandinavia</td>
<td>4% Unprompted responses</td>
<td></td>
<td>Australia (#5)</td>
</tr>
<tr>
<td>Thailand</td>
<td>4% Unprompted responses</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Maldives     | 4% Unprompted responses | Prompted response list | |
| Switzerland  | 6% Unprompted responses | | |
| Australia (#3) | 5% Unprompted responses | | |
| Scandinavia | 4% Unprompted responses | | |
| Thailand     | 4% Unprompted responses | | |

PLANNING AND BOOKING BEHAVIOUR

<table>
<thead>
<tr>
<th>Lead Time</th>
<th>Booking Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan</td>
<td>Online vs Offline</td>
</tr>
<tr>
<td>Book</td>
<td>39% plan their trips</td>
</tr>
<tr>
<td>Travel</td>
<td>42% book their trips</td>
</tr>
</tbody>
</table>
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.

**LEAD TIME**

**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

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TRAVELLER SNAPSHOT
INDONESIA

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.

VISITATION AND SPEND*

208,800
Arrivals at YE Dec 2018

24%
First time visitors

192
Flights per week

$0.8bn
Visitor spend at YE Dec 2018

$4,300
Average spend per trip

30
Average nights stayed

*visit 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

NATURE & WILDLIFE

Japan
Australia (#2)
Hawaii
France
Switzerland

AQUATIC & COASTAL

Hawaii
Australia (#2)
Japan
New Zealand
Caribbean

FOOD & WINE

Japan
Italy
France
South Korea
Australia (#6)

DEMAND FOR AUSTRALIA

FASHIONABILITY

Unprompted responses

Desirability

Japan
Australia
France
South Korea
Europe

Consideration

Unprompted responses

Japan
South Korea
Australia (#3)
France
Italy

Intention

Unprompted responses

Japan
South Korea
Australia
Hong Kong
France

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME

PLAN
36% plan their trips
1-2 months Prior

BOOK
34% book their trips
1-2 months in advance

TRAVEL
Peak travel season
Jun-Jul Dec

ONLINE VS OFFLINE

79% use one or more online booking sources
54% use one or more offline booking sources

DIRECT VS INDIRECT

66% use one or more direct booking sources
80% use one or more indirect booking sources

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*

- **469,200** Arrivals at YE Dec 2018
- **$2.0bn** Visitor spend at YE Dec 2018
- **50%** First time visitors
- **64** Flights per week
- **$4,500** Average spend per trip
- **25** Average nights stayed

*visit 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

- Australia (1) 50%
- Switzerland 37%
- Hawaii 36%
- Canada 35%
- New Zealand 34%

AQUATIC & COASTAL

- Hawaii 57%
- Maldives 49%
- Australia (3) 46%
- Caribbean 38%
- Fiji 34%

FOOD & WINE

- Italy 60%
- France 55%
- Spain 38%
- Germany 26%
- Australia (8) 16%

DEMAND FOR AUSTRALIA

DESIRABILITY

- Australia (4) 4%
- USA 6%
- Europe 4%
- France 13%
- Italy 3%

FASHIONABILITY

- Australia (4) 14%
- USA 30%
- Italy 30%
- France 38%
- UK 14%

CONSIDERATION

- Australia (4) 20%
- USA 20%
- Australia (9) 6%
- Thailand 11%
- Italy 21%

INTENTION

- Australia (9) 11%
- USA 12%
- Italy 19%
- France 20%
- Australia (1) 20%

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME

- **PLAN**
  - 54% plan their trips
  - 3-6 months prior
- **BOOK**
  - 46% book their trips
  - 3-6 months in advance
- **TRAVEL**
  - Peak travel season
  - March, August

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.

**VISITATION AND SPEND***

- 401,100 Arrivals at YE Dec 2018
- 20% First time visitors
- 114 Flights per week
- $1.3bn Visitor spend at YE Dec 2018
- $3,800 Average spend per trip
- 24 Average nights stayed

*visit 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

**MOTIVATIONS FOR TRAVEL**

**DRIVERS OF DESTINATION CHOICE**

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

**NATURE & WILDLIFE**

<table>
<thead>
<tr>
<th>Country</th>
<th># of responses</th>
<th>Desired</th>
<th>Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia (1)</td>
<td>49%</td>
<td>45%</td>
<td>41%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>48%</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>44%</td>
<td>39%</td>
<td>35%</td>
</tr>
<tr>
<td>Japan</td>
<td>44%</td>
<td>38%</td>
<td>34%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>34%</td>
<td>33%</td>
<td>30%</td>
</tr>
</tbody>
</table>

**AUSTRALIA’S PERFORMANCE**

**AQUATIC & COASTAL**

<table>
<thead>
<tr>
<th>Country</th>
<th># of responses</th>
<th>Desired</th>
<th>Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia (1)</td>
<td>45%</td>
<td>46%</td>
<td>42%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>42%</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>29%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Mauritius</td>
<td>27%</td>
<td>23%</td>
<td>20%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>18%</td>
<td>16%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**FOOD & WINE**

<table>
<thead>
<tr>
<th>Country</th>
<th># of responses</th>
<th>Desired</th>
<th>Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>48%</td>
<td>50%</td>
<td>42%</td>
</tr>
<tr>
<td>Australia (2)</td>
<td>41%</td>
<td>42%</td>
<td>36%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>39%</td>
<td>40%</td>
<td>34%</td>
</tr>
<tr>
<td>France</td>
<td>38%</td>
<td>39%</td>
<td>33%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>36%</td>
<td>37%</td>
<td>31%</td>
</tr>
</tbody>
</table>

**DEMAND FOR AUSTRALIA**

**DESIRABILITY**

Unprompted responses

<table>
<thead>
<tr>
<th>Country</th>
<th># of responses</th>
<th>Desired</th>
<th>Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>10%</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>Australia (2)</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>Europe</td>
<td>5%</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>France</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>4%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

**FASHIONABILITY**

Unprompted responses

<table>
<thead>
<tr>
<th>Country</th>
<th># of responses</th>
<th>Desired</th>
<th>Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>45%</td>
<td>45%</td>
<td>40%</td>
</tr>
<tr>
<td>France</td>
<td>33%</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>South Korea</td>
<td>33%</td>
<td>33%</td>
<td>28%</td>
</tr>
<tr>
<td>Australia (4)</td>
<td>25%</td>
<td>25%</td>
<td>21%</td>
</tr>
<tr>
<td>UK</td>
<td>24%</td>
<td>24%</td>
<td>20%</td>
</tr>
</tbody>
</table>

**CONSIDERATION**

Prompted response list

<table>
<thead>
<tr>
<th>Country</th>
<th># of responses</th>
<th>Desired</th>
<th>Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>50%</td>
<td>50%</td>
<td>44%</td>
</tr>
<tr>
<td>Australia (2)</td>
<td>46%</td>
<td>46%</td>
<td>40%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>35%</td>
<td>35%</td>
<td>29%</td>
</tr>
<tr>
<td>South Korea</td>
<td>34%</td>
<td>34%</td>
<td>29%</td>
</tr>
<tr>
<td>China</td>
<td>29%</td>
<td>29%</td>
<td>24%</td>
</tr>
</tbody>
</table>

**INTENTION**

Prompted response list

<table>
<thead>
<tr>
<th>Country</th>
<th># of responses</th>
<th>Desired</th>
<th>Desired</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>30%</td>
<td>30%</td>
<td>24%</td>
</tr>
<tr>
<td>Australia (2)</td>
<td>26%</td>
<td>26%</td>
<td>20%</td>
</tr>
<tr>
<td>South Korea</td>
<td>18%</td>
<td>18%</td>
<td>13%</td>
</tr>
<tr>
<td>China</td>
<td>16%</td>
<td>16%</td>
<td>10%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>15%</td>
<td>15%</td>
<td>10%</td>
</tr>
</tbody>
</table>

**PLANNING AND BOOKING BEHAVIOUR**

**LEAD TIME**

- PLAN: 47% plan their trips 3-6 months prior
- BOOK: 39% book their trips 3-6 months in advance
- TRAVEL: Peak travel season: August - Nov-Dec

**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

TRAVELLER SNAPSHOT
NEW ZEALAND

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.

VISITATION AND SPEND*

- 1,384,900 Arrivals at YE Dec 2018
- 7% First time visitors
- $2.6bn Visitor spend at YE Dec 2018
- $2,000 Average spend per trip
- 510 Flights per week
- 10 Average nights stayed

*visit 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
- Australia (#1) 67%
- Canada 52%
- Hawaii 49%
- Switzerland 47%
- Scandinavia 47%

AQUATIC & COASTAL
- Australia (#1) 77%
- Hawaii 64%
- Fiji 60%
- Maldives 46%
- Caribbean 45%

FOOD & WINE
- Italy 72%
- France 72%
- Australia (#3) 53%
- Greece 50%
- Spain 49%

DEMAND FOR AUSTRALIA

DESIRABILITY
- Unprompted responses
- Europe 11%
- Other South Pacific 8%
- USA 8%
- Australia (#4) 6%
- Hawaii 5%

FASHIONABILITY
- Unprompted responses
- USA 47%
- Australia (#2) 39%
- France 32%
- UK 27%
- Italy 26%

CONSIDERATION
- Prompted responses
- Australia (#1) 70%
- UK 40%
- USA 33%
- Hawaii 29%
- Fiji 28%

INTENTION
- Prompted responses
- Australia (#1) 47%
- Australia (#3) 17%
- USA 13%
- Fiji 11%
- Other South Pacific 10%

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME
- PLAN 46% plan their trips
- 3-6 months prior
- BOOK 48% book their trips
- 3-6 months in advance
- TRAVEL Peak travel season
- Jul, Oct, Dec

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

TRAVELLER SNAPSHOT
SINGAPORE

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*

447,800 Arrivals at YE Dec 2018
14% First time visitors
243 Flights per week
$1.5bn Visitor spend at YE Dec 2018
$3,900 Average spend per trip
15 Average nights stayed

*visit 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

NATURE & WILDLIFE

New Zealand 53%
Japan 52%
Australia (#3) 48%
Switzerland 47%
Scandinavia 37%

AQUATIC & COASTAL

Australia (#1) 55%
Hawaii 41%
New Zealand 33%
Mauritius 28%
Caribbean 26%

FOOD & WINE

Japan 59%
Hong Kong 46%
Taiwan 45%
France 41%

AUSTRALIA (#5) 40%

DEMAND FOR AUSTRALIA

DESIRABILITY

Unprompted responses

Japan 15%
Europe 7%
Switzerland 6%
Scandinavia 4%
Australia (#6) 4%

FASHIONABILITY

Unprompted responses

Japan 49%
South Korea 32%
USA 27%
France 25%
Australia (#5) 20%

CONSIDERATION

Unprompted response list

Japan 55%
Australia (#2) 45%
Taiwan 37%
South Korea 35%
Hong Kong 33%

INTENTION

Unprompted response list

Japan 36%
Australia (#2) 26%
Taiwan 21%
Hong Kong 18%
South Korea 18%

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME

PLAN
47% plan their trips
3-6 months prior

BOOK
39% book their trips
3-6 months in advance

TRAVEL
Peak travel season
Nov – Dec

BOOKING SOURCES

ONLINE VS OFFLINE

79% use one or more online booking sources
32% use one or more offline booking sources

DIRECT VS INDIRECT

70% use one or more direct booking sources
52% use one or more indirect booking sources

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
- Australia (#1): 52%
- Switzerland: 48%
- Hawaii: 47%
- New Zealand: 42%
- Maldives: 39%

AQUATIC & COASTAL
- Australia (#2): 42%
- Maldives: 39%
- Caribbean: 36%
- Indonesia: 29%

FOOD & WINE
- France: 47%
- Italy: 44%
- Thailand: 28%
- Vietnam: 27%
- Australia (#7): 22%

DEMAND FOR AUSTRALIA

DESIRABILITY
- Unprompted responses
  - Hawaii: 12%
  - Australia (#2): 8%
  - Switzerland: 7%
  - Europe: 7%
  - USA: 6%

FASHIONABILITY
- Unprompted responses
  - USA: 25%
  - Hawaii: 23%
  - France: 20%
  - Italy: 19%
  - Australia (#5): 16%

CONSIDERATION
- Prompted response list
  - Australia (#1): 27%
  - Hawaii: 25%
  - France: 24%
  - Italy: 23%
  - Switzerland: 23%

INTENTION
- Prompted response list
  - Vietnam: 17%
  - Australia (#2): 14%
  - Hawaii: 12%
  - Thailand: 11%
  - USA: 10%

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME
- PLAN: 45% plan their trips, 3-6 months prior
- BOOK: 48% book their trips, 1-2 months in advance
- TRAVEL: Peak travel season, Dec – Mar

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

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.

### Visitor Arrivals and Spending

**733,400** arrivals at YE Dec 2018

**$3.4bn** visitor spend at YE Dec 2018

**35%** first-time visitors

**29** flights per week

**$5,000** average spend per trip

**32** average nights stayed

*visit 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

**Visit tourism.australia.com** for latest statistics

### 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

<table>
<thead>
<tr>
<th>Country</th>
<th>Lead</th>
<th>Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>57%</td>
<td>34%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>54%</td>
<td>24%</td>
</tr>
<tr>
<td>Canada</td>
<td>49%</td>
<td>19%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>45%</td>
<td>18%</td>
</tr>
<tr>
<td>South Africa</td>
<td>40%</td>
<td>10%</td>
</tr>
</tbody>
</table>

#### Aquatic & Coastal

<table>
<thead>
<tr>
<th>Country</th>
<th>Lead</th>
<th>Considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>58%</td>
<td>31%</td>
</tr>
<tr>
<td>USA</td>
<td>31%</td>
<td>10%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>30%</td>
<td>9%</td>
</tr>
<tr>
<td>Mexico</td>
<td>28%</td>
<td>7%</td>
</tr>
<tr>
<td>Australia</td>
<td>26%</td>
<td>7%</td>
</tr>
</tbody>
</table>

#### Food & Wine

<table>
<thead>
<tr>
<th>Country</th>
<th>Lead</th>
</tr>
</thead>
<tbody>
<tr>
<td>Caribbean</td>
<td>31%</td>
</tr>
<tr>
<td>USA</td>
<td>30%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>28%</td>
</tr>
<tr>
<td>Mexico</td>
<td>27%</td>
</tr>
<tr>
<td>Australia</td>
<td>26%</td>
</tr>
</tbody>
</table>

### Demand for Australia

<table>
<thead>
<tr>
<th>Country</th>
<th>Unprompted responses</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>13%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>9%</td>
</tr>
<tr>
<td>Australia</td>
<td>9%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>6%</td>
</tr>
<tr>
<td>Maldives</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Planning and Booking Behaviour

#### Lead Time

- **Plan**: 46% plan their trips 3-6 months prior
- **Book**: 46% book their trips 3-6 months in advance
- **Travel**: Peak travel season is Dec-Mar

#### 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

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.

**MARKET OVERVIEW**

- **789,100** Arrivals at YE Dec 2018
- **54%** First time visitors
- **130** Flights per week
- **$3.8bn** Visitor spend at YE Dec 2018
- **$5,100** Average spend per trip
- **18** Average nights stayed

**MOTIVATIONS FOR TRAVEL**

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

**AUSTRALIA’S PERFORMANCE**

**NATURE & WILDLIFE**

<table>
<thead>
<tr>
<th>Country</th>
<th>Australia (1)</th>
<th>Italy</th>
<th>New Zealand</th>
<th>Switzerland</th>
<th>Greece</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia (1)</td>
<td>50%</td>
<td>48%</td>
<td>45%</td>
<td>43%</td>
<td>39%</td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td>46%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>New Zealand</td>
<td></td>
<td></td>
<td>39%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td></td>
<td></td>
<td></td>
<td>39%</td>
<td></td>
</tr>
<tr>
<td>Greece</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>39%</td>
</tr>
</tbody>
</table>

**AQUATIC & COASTAL**

<table>
<thead>
<tr>
<th>Country</th>
<th>Australia (1)</th>
<th>Fiji</th>
<th>Italy</th>
<th>Greece</th>
<th>Brazil</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia (1)</td>
<td>46%</td>
<td>33%</td>
<td>33%</td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Fiji</td>
<td></td>
<td></td>
<td>33%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Italy</td>
<td></td>
<td>33%</td>
<td></td>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>Greece</td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Brazil</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>29%</td>
</tr>
</tbody>
</table>

**FOOD & WINE**

<table>
<thead>
<tr>
<th>Country</th>
<th>Italy</th>
<th>France</th>
<th>Spain</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>72%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>63%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Spain</td>
<td></td>
<td></td>
<td>43%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
<td>42%</td>
</tr>
</tbody>
</table>

**DEMAND FOR AUSTRALIA**

- **France** 6%
- **Italy** 5%
- **Europe** 5%
- **Australia (#4)** 4%
- **UK** 3%

- **Unprompted responses**

**DESIRABILITY**

**FASHIONABILITY**

<table>
<thead>
<tr>
<th>Country</th>
<th>Italy</th>
<th>France</th>
<th>UK</th>
<th>Germany</th>
<th>Australia (#4)</th>
<th>Other EU</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia (#4)</td>
<td>14%</td>
<td>23%</td>
<td>23%</td>
<td>25%</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Other EU</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>

**CONSIDERATION**

<table>
<thead>
<tr>
<th>Country</th>
<th>Italy</th>
<th>France</th>
<th>UK</th>
<th>Germany</th>
<th>Australia (#5)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>37%</td>
<td>32%</td>
<td>32%</td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>32%</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td></td>
<td></td>
<td>32%</td>
<td></td>
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<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
<td>25%</td>
<td>23%</td>
</tr>
<tr>
<td>Australia (#5)</td>
<td>23%</td>
<td>23%</td>
<td>23%</td>
<td>23%</td>
<td>23%</td>
</tr>
</tbody>
</table>

**INTENTION**

<table>
<thead>
<tr>
<th>Country</th>
<th>Italy</th>
<th>France</th>
<th>UK</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
<td>13%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UK</td>
<td></td>
<td></td>
<td>13%</td>
<td></td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
<td>10%</td>
</tr>
</tbody>
</table>

**PLANNING AND BOOKING BEHAVIOUR**

**LEAD TIME**

- **PLAN** 46% plan their trips
  - 3-6 months prior
- **BOOK** 45% book their trips
  - 3-6 months in advance

**TRAVEL**

- Peak travel season: Dec-Mar

**ONLINE VS OFFLINE**

- 65% use one or more online booking sources
- 49% use one or more offline booking sources

**DIRECT VS INDIRECT**

- 56% use one or more direct booking sources
- 60% use one or more indirect booking sources