

CONSUMER PROFILE UNITED STATES OF AMERICA



SUMMARY

Traveller Profile

Motivations for travel

US travellers choose a destination based on good food and wine, aquatic and coastal experiences and world-class nature. A destination must also satisfy the rational factors of safety and security and value for money.

Where are they going?

The most-visited destination for US travellers is Europe. Specifically, France followed by the UK, Italy and Germany. Australia is 25th on the list in terms of trips taken in 2016.

Where do they want to go?

Europe is most definitely on their to-do list in the next two years. Australia makes it onto the aspiration list for the next four years, in fifth position, but Europe is the priority for US travellers.

Who do they travel with?

Over one-third of US consumers travel as a couple.

Perceptions of Australia

Australia is perceived as a destination offering aspirational, iconic landmarks from coastal to outback terrain, modern cities, laidback people and world-class beaches.

Australia is well-placed to deliver on the importance factors which are most highly valued among US travellers, with Australia being ranked in first position for aquatic and coastal and world-class nature experiences. US travellers have weaker perceptions of Australia's food and wine offering.

Traveller Behaviour

How do they prefer to travel?

- › Trip length is on par with the average of international travellers, at nine nights featuring an average of four destinations.
- › Preferred styles of travel include visiting friends and family and resort holidays.
- › There is almost a fifty/fifty split in terms of the ratio of trips which are tour groups, compared to trips which are semi-or fully-independent.

When do they travel?

May to July are the peak travel months for US consumers, with lead times typically falling between three to six months.

For travel to Australia, specifically, December-March and July are the peak travel periods for US travellers.

How do they plan to travel?

For early planning and inspiration, US travellers are using a combination of online and offline sources, including talking to friends and family, searching the internet, or reading travel and guide books.

How do they book travel?

When it comes to booking, the majority are doing so online, directly through an airline or via a travel agent, either online, via telephone or in person.



TripAdvisor Facts

The US is the largest international market viewing Australia on TripAdvisor, at 8.1% of all sessions. In 2016 this figure grew 15.3% year-on-year. Despite the US being the largest international market viewing Australia, this represents a small percentage of all the other international destinations they are searching.

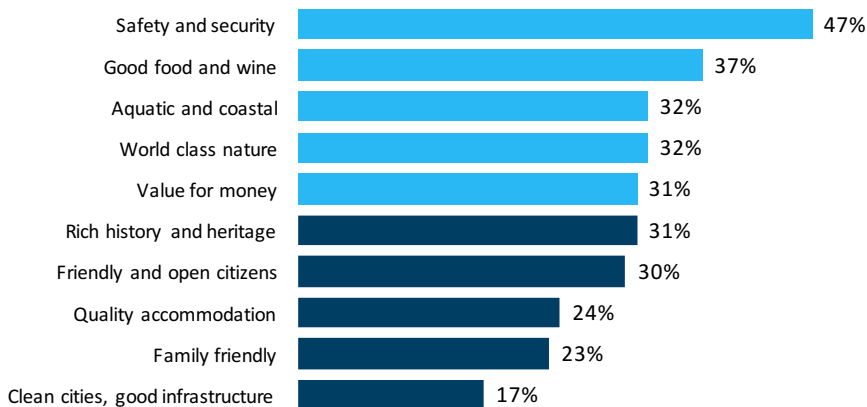
AMERICAN TRAVELLER PROFILE



The information in this fact sheet comes from Tourism Australia's (TA) international consumer research study the 'Consumer Demand Project' (CDP). The CDP was set up in 2012 to look into how global consumers view Australia and what most motivates them to visit.

Insights from the CDP have been used extensively to inform and support development of TA's strategic direction, campaign development as well as to inform the tourism industry of potential opportunities to build the value of Australian tourism. The research is used to help shape the future marketing of Australia and identify opportunities to make the country's tourism offering more attractive to overseas visitors.

Most important factors when selecting a holiday destination



Read as: 47% of respondents rate 'safety and security' among the top five most important factors when choosing a holiday destination.

Notes: *Average nights: the sum of all nights divided by the sum of all visitors. **Median nights: represents the midpoint length of stay for which 50% of visitors stay less and 50% stay longer, removing the impact of very long stay visitors. † Data refers to an average of 2012-2016. ‡ Refers to share of arrivals of respective purpose. † Other includes education, employment and others. Sources: 1. Department of Immigration and Border Protection, December 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016.

MARKET OVERVIEW

In 2016, the United States of America (USA) was Australia's fourth largest inbound market for visitor arrivals, the third largest market for total visitor spend and the fourth for visitor nights.



Holiday[§]
44%



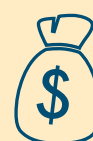
Visiting friends
& relatives[§]
25%



Business[§]
20%



Other^{§†}
12%



\$3.7bn
Total spend²
(↑ 7 per cent)



**Average nights
stayed[†]**



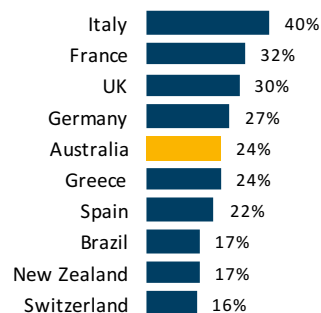
**Median nights
stayed[†]**

AUSTRALIA'S POSITION AND OPPORTUNITY

Purchase funnel

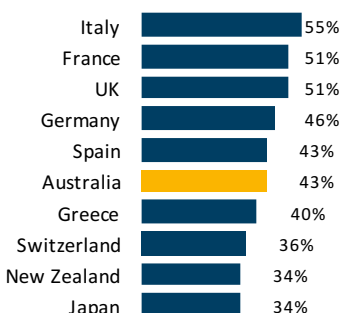
Aspiration

Which of the following destinations are you *considering travelling to* in the next 4 years?



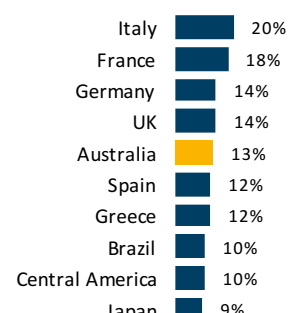
Awareness of holiday experiences

How aware would you say you are of the holiday experiences on offer in the following destinations?



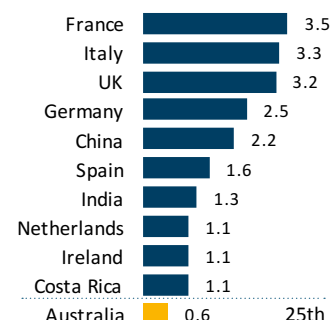
Intention

Which of the following destinations are you *actively planning to visit* for a holiday in the next 2 years?



Visitation

Millions of trips in 2015¹



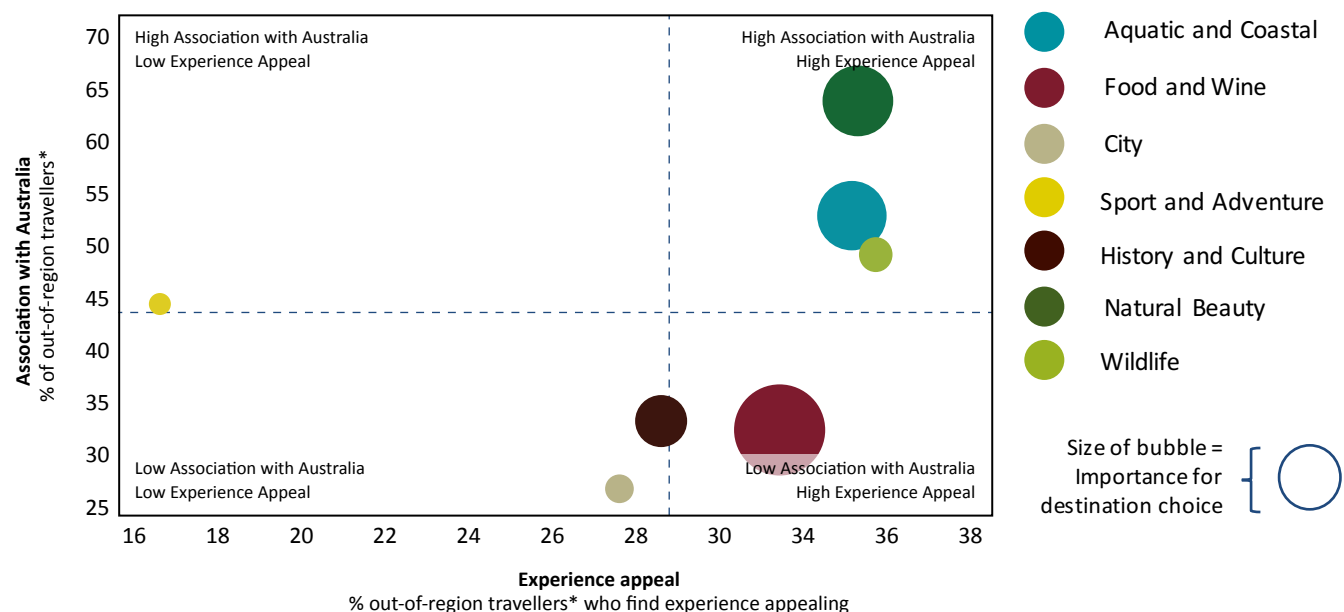
Read as: 24% of US consumers are considering travel to Australia in the next 4 years, while 13% are intending to visit in the next 2 years. Australia is ranked #25 for visitation against other out-of-region (OOR) destinations for US travellers.

Sources: 1. Tourism Economics, YE2015

Opportunity matrix

The opportunity matrix is a comprehensive way to showcase the opportunity for Australian tourism through identifying the key thematic appeals and experience categories.

Among the US market, Australia performs strongest with respect to natural beauty, aquatic and coastal and wildlife experiences. These types of experiences have a strong level of appeal and association with Australia (higher and to the right), while food and wine experiences are considered most important (larger bubble). Food and wine experiences generate lower levels of association with Australia among this market.



Read as: Food and wine experiences are very important among the US market, and while there is a high level of tested appeal for Australia's food and wine experiences, the unprompted association with these types of experiences is weaker than average.

Notes: *Out-of-region travellers refers to consumers travelling outside their region of residence.

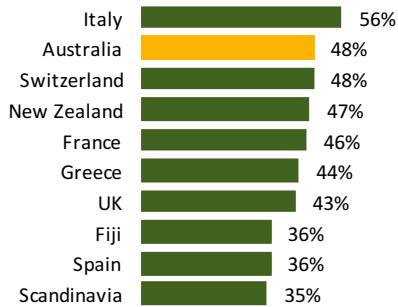
NATURE AND WILDLIFE

How does Australia rate?

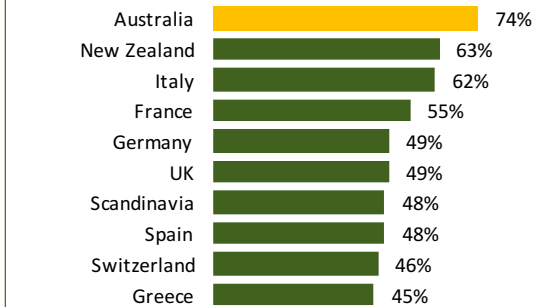
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

World class nature

Respondents who have not visited Australia



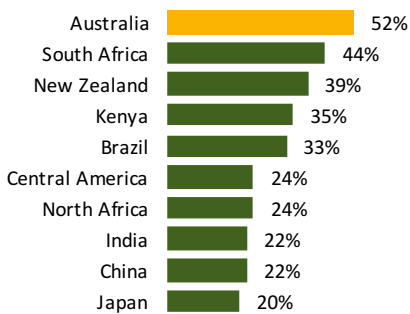
Respondents who have visited Australia



Read as: 48% of respondents who have not visited Australia associate Australia with 'world class nature.' This figure rises to 74% among those who have visited.

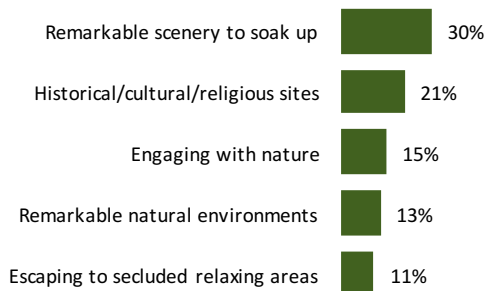
Unique and interesting wildlife

Total respondents



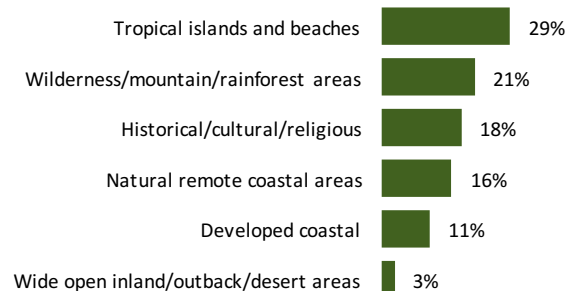
Read as: 52% of total respondents associate Australia with 'unique and interesting wildlife.'

Elements of 'world class nature'



Read as: 30% of respondents said that 'remarkable scenery to soak up' is a key element of 'world class nature'.

Most important types of 'world class nature'



Read as: 29% of respondents said 'tropical islands and beaches' are an important type of 'world class nature'.

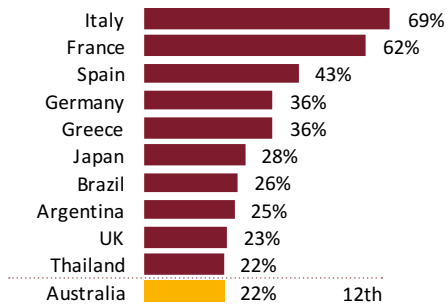
FOOD AND WINE

How does Australia rate?

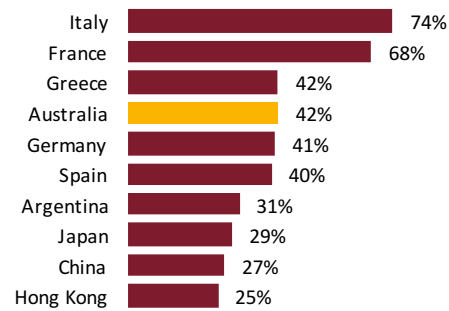
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

Good food and wine

Respondents who have not visited Australia

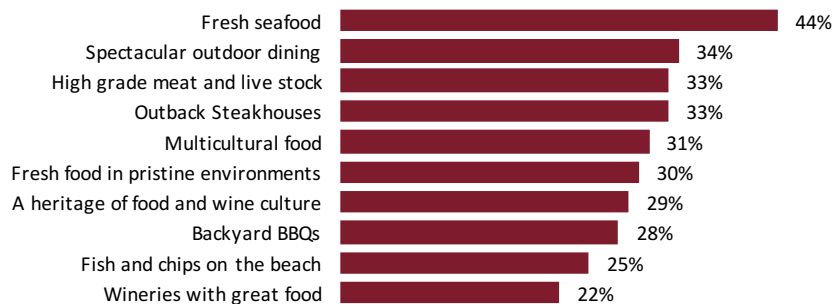


Respondents who have visited Australia



Read as: 22% of respondents who have not visited Australia associate Australia with 'good food and wine.' This figure rises to 42% among those who have visited.

Current associations with Australian food and wine



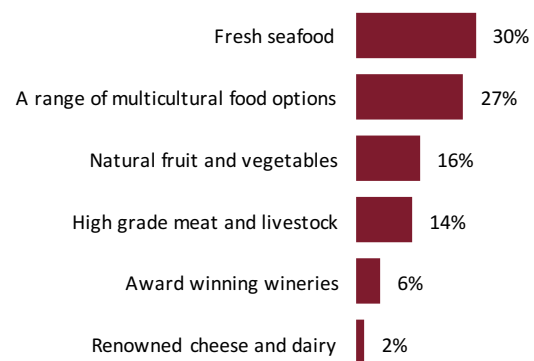
Read as: 44% of respondents associate Australian food and wine with 'fresh seafood'.

Elements of 'good food and wine'



Read as: 29% of respondents said 'a heritage of food and wine culture' is a key element of 'good food and wine.'

Important types of 'good food and wine'



Read as: 30% of respondents said 'fresh seafood' is an important type of 'good food and wine.'

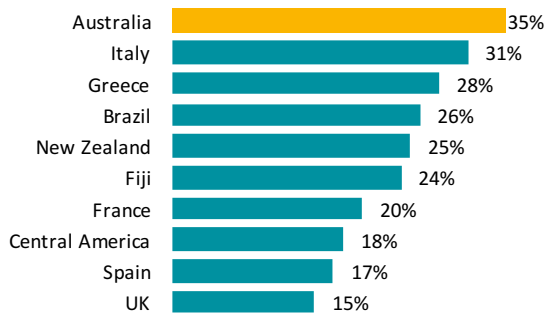
AQUATIC AND COASTAL

How does Australia rate?

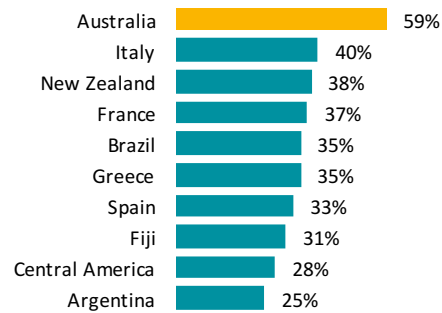
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

Aquatic and coastal

Respondents who have not visited Australia



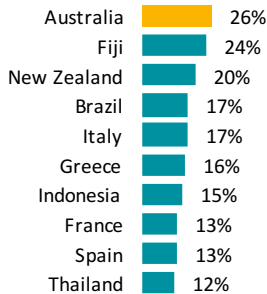
Respondents who have visited Australia



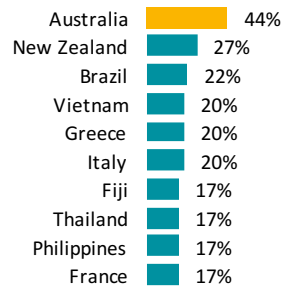
Read as: 35% of respondents who have not visited Australia associate Australia with 'aquatic and coastal' experiences. This figure rises to 59% among those who have visited.

Remote coastal, beach and aquatic locations

Respondents who have not visited Australia



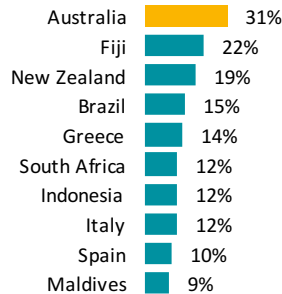
Respondents who have visited Australia



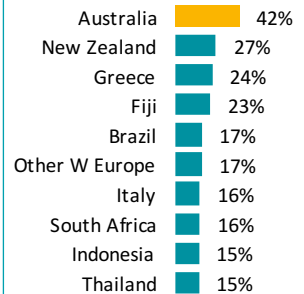
Read as: 44% of respondents that have visited Australia associate Australia with 'remote coastal, beach and aquatic locations'.

Aquatic wildlife

Respondents who have not visited Australia



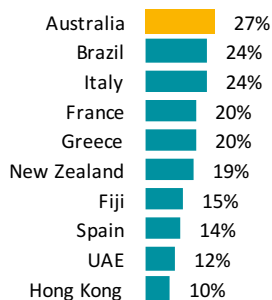
Respondents who have visited Australia



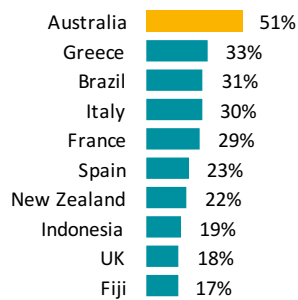
Read as: 42% of respondents that have visited Australia associate Australia with 'aquatic wildlife'.

Developed coastal and beach locations

Respondents who have not visited Australia



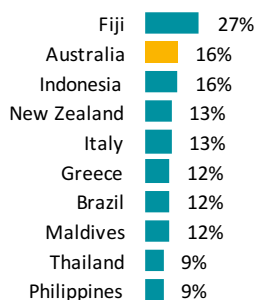
Respondents who have visited Australia



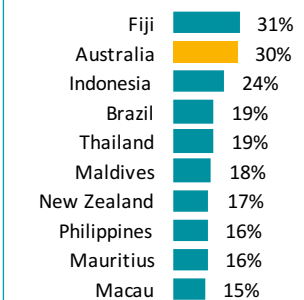
Read as: 51% of respondents that have visited Australia associate Australia with 'developed coastal and beach locations'.

Tropical islands and locations

Respondents who have not visited Australia



Respondents who have visited Australia

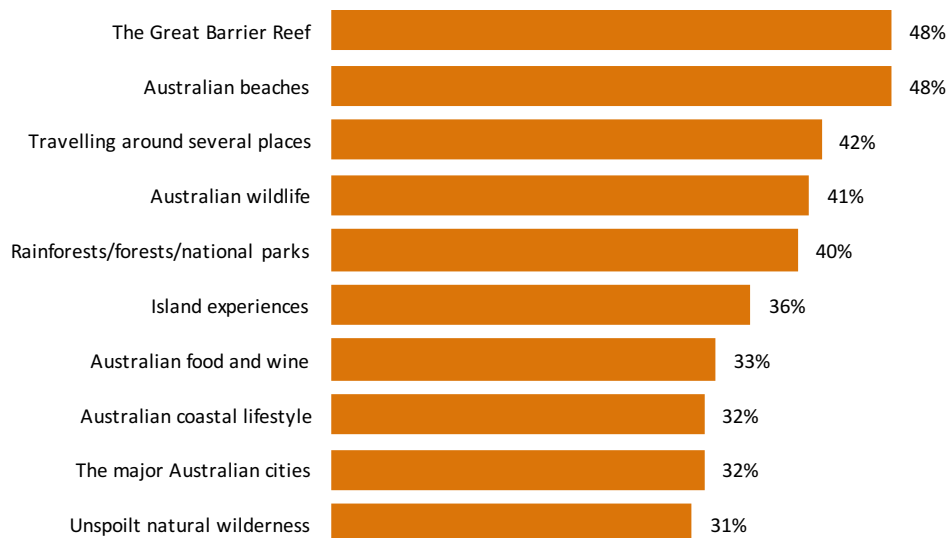


Read as: 30% of respondents that have visited Australia associate Australia with 'tropical islands and locations'.

ATTRACTIONS AND EVENTS

Attractions and events play a valuable role in attracting visitors to Australia in addition to encouraging visitors to disperse throughout the country and extend their stay.

Top 10 Australian attractions



Read as: 48% of respondents indicate 'The Great Barrier Reef' as an appealing Australian attraction.

Leisure events

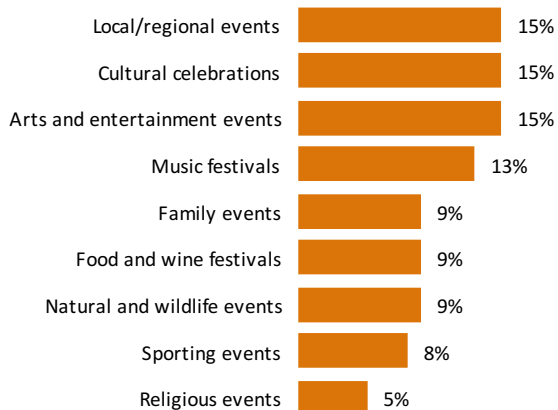
Respondents were asked to what extent they agreed with the following statement:

When travelling internationally I always look to time my trip and places visited with an event or festival of interest.



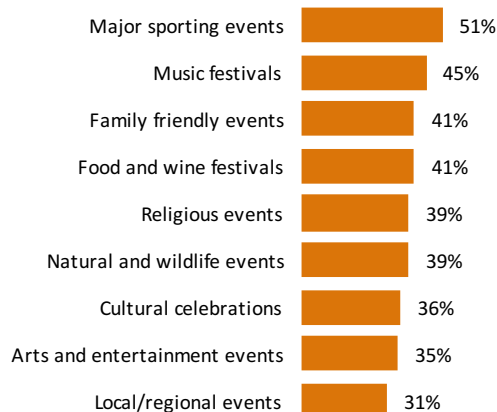
Read as: 46% of respondents indicate that they always look to time their trip and places visited with an event or festival of interest.

Most appealing events to attend overseas



Read as: 15% of respondents indicate 'local/regional events' as appealing elements when travelling overseas.

Events with the greatest influence on destination choice

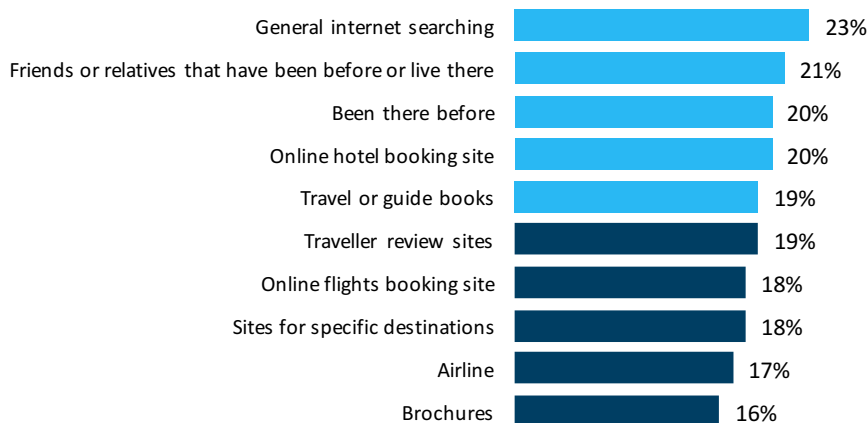


Read as: 51% of respondents indicate the influence of 'major sporting events' on destination choice.

PLANNING AND BOOKING INFORMATION SOURCES

The following charts highlight the information sources that US consumers use to plan and book their holidays.

Preferred sources for *early planning and holiday inspiration*



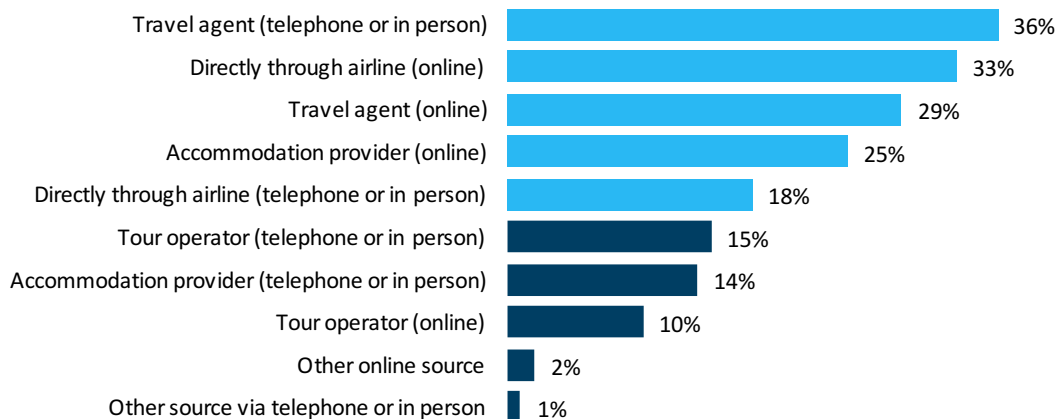
Read as: 23% of respondents indicate 'general internet searching' as a preferred source during the early stages of planning a holiday.

Preferred sources for *seeking information about a holiday destination*



Read as: 20% of respondents indicate 'friends or relatives that have been before or live there' as a preferred source for seeking information about a holiday destination.

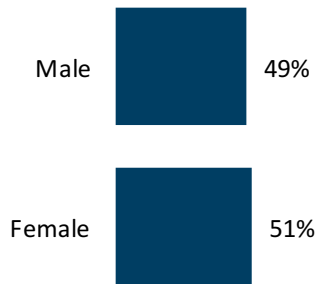
Preferred sources used to *book a holiday*



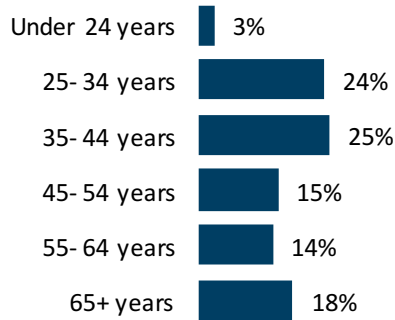
Read as: 36% of respondents indicate 'travel agent (telephone or in person)' as a preferred source when booking a holiday.

RESPONDENT PROFILE

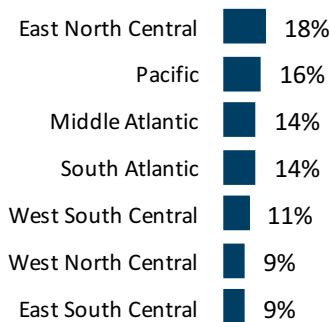
Gender



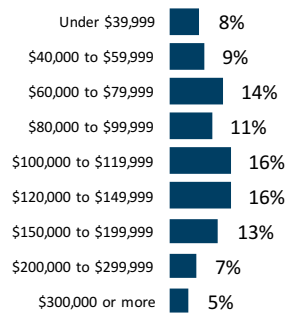
Age



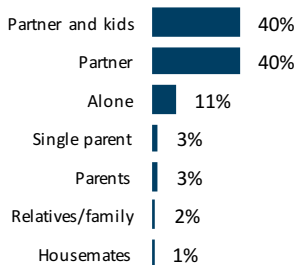
Place of residence



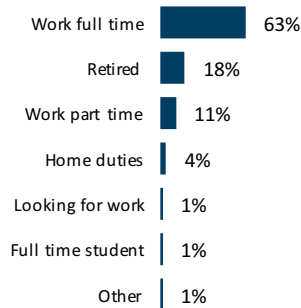
Income



Living situation



Employment status



Occupations



ABOUT THE RESEARCH

The Consumer Demand Project (CDP) research is carried out by BDA Marketing Planning, a consultancy who specialise in international demand side strategy development and consumer research. It helps determine the strategic priorities to achieve the Tourism 2020 goal, by providing a comprehensive assessment of Australia's current destination appeal and the latent demand potential. The research is conducted annually across eleven of Australia's key tourism markets: China, Germany, India, Indonesia, Japan, Malaysia, New Zealand, Singapore, South Korea, UK and USA. In 2016, the following markets were integrated into the program: Hong Kong, Taiwan, Canada, Brazil, France and Italy. Over the last five years, Tourism Australia have spoken to over 90,000 international long-haul travellers via online research panels.

WANT TO KNOW MORE?

Fact sheets for seventeen of Australia's key tourism markets can be accessed at: <http://www.tourism.australia.com/statistics/consumer-demand-research.aspx>

For more information, please contact:

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