

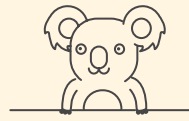
Definition of a High Value Traveller



TRAVEL LONG HAUL



PREFERENCE FOR AUSTRALIA



KEY DRIVERS FOR DESTINATION CHOICE



REPRESENT HIGH VALUE

The Italian High Value Traveller



0.6m
HVTs in Italy considering Australia



representing 11% of the Italian long haul travel market



Approximately 1 in 3 Italian visitors to Australia are HVTs



with an additional 1.7m Italian HVTs not considering Australia



Staying an average 9 nights



Spending 2-3x more than the average traveller

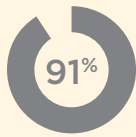


69% Free and Independent Travel

Did you know?



89% seek authentic experiences through the local culture and getting a taste of everyday life.



91% travel to become more open-minded and knowledgeable about the world they live in.



75% look for purposeful travel where it allows them to give back to the destination they visit.



78% seek destinations that are fashionable and cool.

Drivers of destination choice



Nature and wildlife



Safety and security



Aquatic and coastal

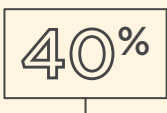


History and heritage

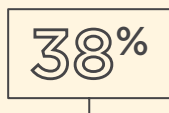


Food and wine

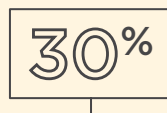
Planning sources



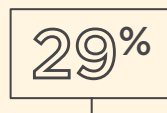
40% Internet searching



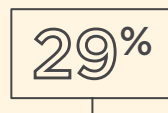
38% Traveller review sites



30% National Tourism Organisation site



29% Online hotel booking site



29% Social media

Booking behaviour

3-6 months

47%

Destination choice lead time

1-2 months

45%

Booking lead time

61%

Online booking

38%

Offline booking