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

**VISITATION AND SPEND***

- **288,000** Arrivals at YE Dec 2018
- **58%** First time visitors
- **$1.5bn** Visitor spend at YE Dec 2018
- **$5,800** Average spend per trip
- **21** Flights per week
- **39** Average nights stayed

*visit tourism.australia.com for latest statistics

**MOTIVATIONS FOR TRAVEL**

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

**AUSTRALIA'S PERFORMANCE**

- **NATURE & WILDLIFE**
  - **Australia (#1)**
  - **Switzerland**
  - **Hawaii**
  - **New Zealand**
  - **Maldives**

- **AQUATIC & COASTAL**
  - **Hawaii**
  - **Australia (#2)**
  - **Maldives**
  - **Caribbean**
  - **Indonesia**

- **FOOD & WINE**
  - **France**
  - **Italy**
  - **Thailand**
  - **Vietnam**
  - **Australia (#7)**

**DEMAND FOR AUSTRALIA**

- **DESIRABILITY**
  - **Hawaii**
  - **Australia (#2)**
  - **Switzerland**
  - **Europe**
  - **USA**

- **FASHIONABILITY**
  - **USA**
  - **Hawaii**
  - **France**
  - **Italy**
  - **Australia (#5)**

- **CONSIDERATION**
  - **Australia (#1)**
  - **Hawaii**
  - **France**
  - **Italy**
  - **Switzerland**

- **INTENTION**
  - **Vietnam**
  - **Australia (#2)**
  - **Hawaii**
  - **Thailand**
  - **USA**

**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

MARKET OVERVIEW
South Korea remains a steady inbound market for Australia and market share continues to improve year-on-year. High Value Travellers (HVTs) represent approximately 49% of South Korea’s out of region travel market.

HVT DEFINITION
- Travel long haul
- Preference for Australia
- Key drivers of destination choice
- Represent high value

CURRENT MARKET
- 0.3m Total arrivals at YE Dec 2018
- ~1 in 3 of these visitors are HVTs
- 2-3x more spend than average travellers

MARKET OPPORTUNITY
- 7m High Value Travellers in South Korea
- 2.5m considering Australia in the next four years
- 4.5m not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

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

AUSTRALIA’S PERFORMANCE

NATURE & WILDLIFE
- Australia (1) 67%
- Hawaii 59%
- Switzerland 54%
- New Zealand 52%
- Canada 44%

AQUATIC & COASTAL
- Australia (1) 63%
- Hawaii 59%
- Caribbean 41%
- New Zealand 41%
- Maldives 39%

FOOD & WINE
- France 52%
- Italy 48%
- Australia (3) 39%
- Hawaii 32%
- Thailand 32%

TRAVEL ATTRIBUTES

AUTHENTICITY
84%
seek authentic experiences through the local culture and getting a taste of everyday life.

OPEN-MINDEDED
88%
travel to become more openminded and knowledgeable about the world they live in.

PURPOSEFUL
65%
look for purposeful travel where it allows them to give back to the destination they visit.

FASHIONABILITY
83%
seek destinations that are fashionable and cool.

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME
- PLAN: 53% plan their trips 3-6 months Prior
- BOOK: 49% book their trips 1-2 months in advance
- TRAVEL: Peak travel season Dec-Mar

BOOKING SOURCES

ONLINE VS OFFLINE
- 70% use one or more online booking sources
- 46% use one or more offline booking sources

DIRECT VS INDIRECT
- 42% use one or more direct booking sources
- 79% use one or more indirect booking sources