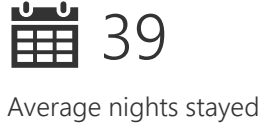
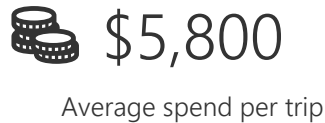
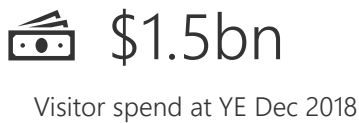
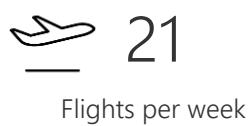
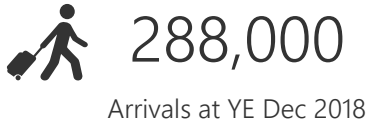




### MARKET OVERVIEW

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

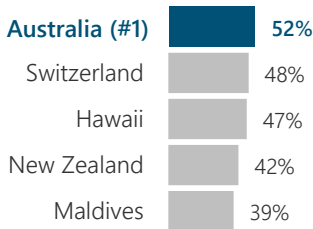
### MOTIVATIONS FOR TRAVEL

#### DRIVERS OF DESTINATION CHOICE

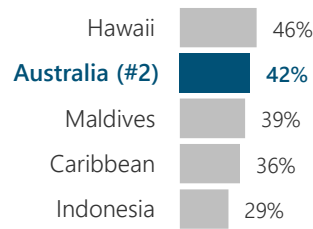
-  #1 Nature & wildlife
-  #2 Safety & security
-  #3 Food & wine
-  #4 Value for money
-  #5 History & heritage

#### AUSTRALIA'S PERFORMANCE

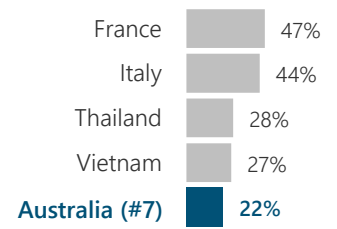
##### NATURE & WILDLIFE



##### AQUATIC & COASTAL



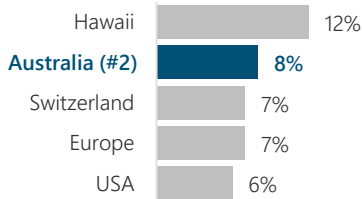
##### FOOD & WINE



### DEMAND FOR AUSTRALIA

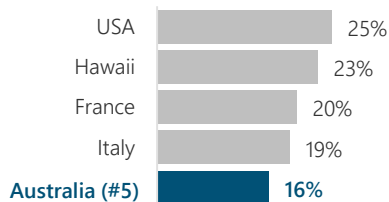
#### DESIRABILITY

Unprompted responses



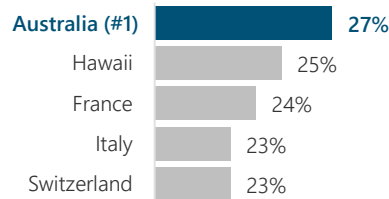
#### FASHIONABILITY

Unprompted responses



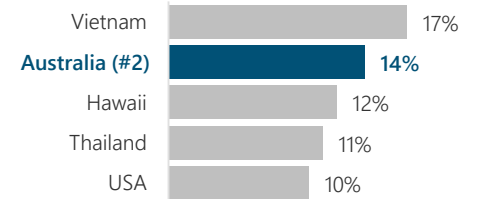
#### CONSIDERATION

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

# HIGH VALUE TRAVELLER SNAPSHOT

## SOUTH KOREA



### 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



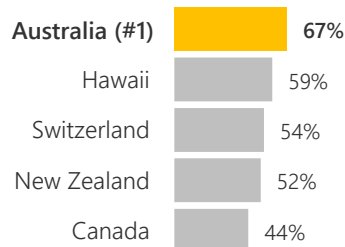
#4 History & heritage



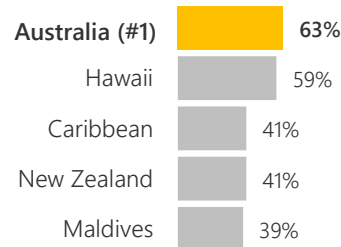
#5 Value for money

#### AUSTRALIA'S PERFORMANCE

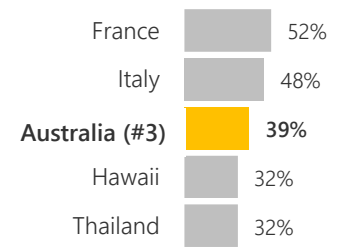
##### NATURE & WILDLIFE



##### AQUATIC & COASTAL



##### FOOD & WINE



### TRAVEL ATTRIBUTES

#### AUTHENTICITY

84%

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

#### OPEN-MINDED

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



##### BOOK

49% book their trips



##### TRAVEL

Peak travel season



#### 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