The High Value Traveller (HVT) is Tourism Australia’s target audience. HVTs value travel, they dream of visiting Australia and enjoy experiences which Australia is known for. Most importantly, they are more likely to spend more, stay longer and disperse further. In 2018, the top markets for HVTs considering Australia were China, followed by New Zealand, India, Malaysia and Hong Kong.

**Drivers of Destination Choice**

1. Nature & wildlife
2. Safety & security
3. Food & wine
4. Aquatic & coastal
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>70%</td>
<td>Australia (#1)</td>
</tr>
<tr>
<td>New Zealand</td>
<td>53%</td>
<td>Hawaii</td>
</tr>
<tr>
<td>Switzerland</td>
<td>46%</td>
<td>Maldives</td>
</tr>
<tr>
<td>Hawaii</td>
<td>45%</td>
<td>New Zealand</td>
</tr>
<tr>
<td>Japan</td>
<td>44%</td>
<td>Caribbean</td>
</tr>
</tbody>
</table>

France: 61%
Italy: 56%
Australia (#3): 51%
Japan: 46%
Hong Kong: 36%

**Travel Attributes**

- **Authenticity**
  93%
  seek authentic experiences through the local culture and getting a taste of everyday life

- **Open-Minded**
  94%
  travel to become more open-minded and knowledgeable about the world they live in

- **Purposeful**
  73%
  look for purposeful travel where it allows them to give back to the destination they visit

- **Fashionability**
  81%
  seek destinations that are fashionable and cool

**Planning and Booking Behaviour**

**LEAD TIME**

<table>
<thead>
<tr>
<th>Plan</th>
<th>Book</th>
<th>Travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>44% plan their trips</td>
<td>38% book their trips</td>
<td>Peak travel season</td>
</tr>
<tr>
<td>3-6 months prior</td>
<td>3-6 months in advance</td>
<td>February, December</td>
</tr>
</tbody>
</table>

**BOOKING SOURCES**

<table>
<thead>
<tr>
<th>Online vs Offline</th>
<th>Direct vs Indirect</th>
</tr>
</thead>
<tbody>
<tr>
<td>77% use one or more online booking sources</td>
<td>59% use one or more direct booking sources</td>
</tr>
<tr>
<td>46% use one or more offline booking sources</td>
<td>71% use one or more indirect booking sources</td>
</tr>
</tbody>
</table>

**MARKET OVERVIEW**

In 2018, China was Australia’s largest inbound market for international visitor arrivals (up 6%) and total visitor expenditure (up 13%), making China one of Tourism Australia’s most important source markets. China has the largest volume of estimated High Value Travellers (HVTs), representing approximately 47% of China’s out of region travel market.

### CURRENT MARKET

1.4m

Total arrivals at YE Dec 2018

~1 in 3 of these visitors are HVTs

2-3x more spend than average travellers

### MARKET OPPORTUNITY

20.4m

High Value Travellers in China

10.8m considering Australia in the next four years

9.6m not considering Australia in the next four years

### DRIVERS OF DESTINATION CHOICE

1. Nature & wildlife
2. Aquatic & coastal
3. Food & wine
4. Safety & security
5. Romantic

### 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>72%</td>
<td>72%</td>
<td>66%</td>
</tr>
<tr>
<td>USA</td>
<td>Maldives</td>
<td>Australia (#2)</td>
</tr>
<tr>
<td>43%</td>
<td>36%</td>
<td>54%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Italy</td>
<td></td>
</tr>
<tr>
<td>46%</td>
<td>49%</td>
<td></td>
</tr>
<tr>
<td>Hawaii</td>
<td>Germany</td>
<td></td>
</tr>
<tr>
<td>43%</td>
<td>35%</td>
<td></td>
</tr>
<tr>
<td>USA</td>
<td>Singapore</td>
<td></td>
</tr>
<tr>
<td>43%</td>
<td>34%</td>
<td></td>
</tr>
</tbody>
</table>

### TRAVEL ATTRIBUTES

<table>
<thead>
<tr>
<th>Authenticity</th>
<th>Open-Minded</th>
<th>Purposeful</th>
<th>Fashionability</th>
</tr>
</thead>
<tbody>
<tr>
<td>97%</td>
<td>97%</td>
<td>94%</td>
<td>94%</td>
</tr>
<tr>
<td>seek authentic experiences through the local culture and getting a taste of everyday life.</td>
<td>travel to become more openminded and knowledgeable about the world they live in.</td>
<td>look for purposeful travel where it allows them to give back to the destination they visit.</td>
<td>seek destinations that are fashionable and cool.</td>
</tr>
</tbody>
</table>

### PLANNING AND BOOKING BEHAVIOUR

<table>
<thead>
<tr>
<th>Lead Time</th>
<th>Booking Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan</td>
<td>Book</td>
</tr>
<tr>
<td>60% plan their trips</td>
<td>60% book their trips</td>
</tr>
<tr>
<td>1-2 months prior</td>
<td>1-2 months in advance</td>
</tr>
</tbody>
</table>

MARKET OVERVIEW

Germany is one of Australia’s most important source markets for youth, with around a third of arrivals between the ages of 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. High Value Travellers (HVTs) represent approximately 42% of Germany’s out of regional travel market.

HVT DEFINITION

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

CURRENT MARKET

- Total arrivals at YE Dec 2018: 0.2m
  - ~1 in 3 of these visitors are HVTs
  - 2-3x more spend than average travellers

MARKET OPPORTUNITY

- High Value Travellers in Germany: 5.5m
  - 1.6m considering Australia in the next four years
  - 3.9m not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

1. Nature & wildlife
2. Safety & security
3. Aquatic & coastal
4. Food & wine
5. Friendly & welcoming

AUSTRALIA’S PERFORMANCE

- Nature & Wildlife
  - Australia (1): 74%
  - New Zealand: 72%
  - Caribbean: 58%
  - Mauritius: 57%
  - Hawaii: 56%
- Aquatic & Coastal
  - Australia (1): 76%
  - Caribbean: 71%
  - Mauritius: 62%
  - Hawaii: 50%
  - Maldives: 55%
- Food & Wine
  - Thailand: 42%
  - Japan: 38%
  - Argentina: 35%
  - Caribbean: 34%
  - Mexico: 32%
  - Australia (8): 26%

TRAVEL ATTRIBUTES

- Authenticity: 95%
- Open-Minded: 89%
- Purposeful: 70%
- Fashionability: 31%

- Seek authentic experiences through the local culture and getting a taste of everyday life.
- Travel to become more openminded and knowledgeable about the world they live in.
- Look for purposeful travel where it allows them to give back to the destination they visit.
- Seek destinations that are fashionable and cool.

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME

- Plan: 59% plan their trips 3-6 months prior
- Book: 58% book their trips 3-6 months in advance
- Travel: Peak travel season: Dec-Mar

BOOKING SOURCES

- Online vs Offline
  - 60% use one or more online booking sources
  - 49% use one or more offline booking sources
- Direct vs Indirect
  - 41% use one or more direct booking sources
  - 76% use one or more indirect booking sources

In 2018, Hong Kong was Australia’s second fastest growing source market in terms of visitor arrivals, growing 10% year-on-year. High Value Travellers (HVTs) represent approximately 41% of Hong Kong’s out of region travel market.

**MOTIVATIONS FOR TRAVEL**

**NATURE & WILDLIFE**
- Australia (#1) 68%
- Switzerland 52%
- New Zealand 49%
- Scandinavia 42%
- Greece 41%

**AQUATIC & COASTAL**
- Hawaii 54%
- Maldives 53%
- Caribbean 45%
- Guam 40%

**FOOD & WINE**
- France 57%
- Thailand 47%
- Australia (#3) 46%
- Italy 46%
- Singapore 35%

**AUTHENTICITY**
- 93%
- Seek authentic experiences through the local culture and getting a taste of everyday life.

**OPEN-MINDED**
- 94%
- Travel to become more openminded and knowledgeable about the world they live in.

**PURPOSEFUL**
- 73%
- Look for purposeful travel where it allows them to give back to the destination they visit.

**FASHIONABILITY**
- 89%
- Seek destinations that are fashionable and cool.

**PLANNING AND BOOKING BEHAVIOUR**

**LEAD TIME**
- **PLAN**
  - 43% plan their trips
  - 3-6 months prior
- **BOOK**
  - 41% book their trips
  - 1-2 months in advance
- **TRAVEL**
  - Peak travel season: Feb-Mar December

**BOOKING SOURCES**
- **ONLINE VS OFFLINE**
  - 77% use one or more online booking sources
  - 38% use one or more offline booking sources
- **DIRECT VS INDIRECT**
  - 63% use one or more direct booking sources
  - 65% use one or more indirect booking sources

In 2018, India was one of Australia’s fastest growing inbound markets in terms of visitor arrivals, growing at 18% year-on-year. Total trip expenditure is also up by 21% at $1.7b. High Value Travellers (HVTs) represent approximately 41% of India’s out of region travel market.

**Drivers of Destination Choice**

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

**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>Hawaii</td>
<td>United States</td>
</tr>
<tr>
<td>73%</td>
<td>72%</td>
<td>62%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>Mauritius</td>
<td>France</td>
</tr>
<tr>
<td>58%</td>
<td>45%</td>
<td>49%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>New Zealand</td>
<td>Italy</td>
</tr>
<tr>
<td>48%</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>UK</td>
<td>USA</td>
<td>UK</td>
</tr>
<tr>
<td>47%</td>
<td>35%</td>
<td>42%</td>
</tr>
<tr>
<td>Germany</td>
<td></td>
<td>USA</td>
</tr>
<tr>
<td>46%</td>
<td></td>
<td>42%</td>
</tr>
</tbody>
</table>

**Motivations for Travel**

- **Authenticity**: 93%
  - Seek authentic experiences through the local culture and getting a taste of everyday life.
- **Open-Minded**: 95%
  - Travel to become more open-minded and knowledgeable about the world they live in.
- **Purposeful**: 92%
  - Look for purposeful travel where it allows them to give back to the destination they visit.
- **Fashionability**: 91%
  - Seek destinations that are fashionable and cool.

**Planning and Booking Behaviour**

- **Lead Time**
  - **Plan**: 40% plan their trips 1-2 months prior
  - **Book**: 47% book their trips 1-2 months in advance
  - **Travel**: Peak travel season in May, December

- **Booking Sources**
  - **Online vs Offline**: 85% use one or more online booking sources, 51% use one or more offline booking sources
  - **Direct vs Indirect**: 71% use one or more direct booking sources, 80% use one or more indirect booking sources

In 2018, Indonesia was Australia’s fastest growing market for visitor expenditure, up 14% year-on-year. Indonesia also sustained record growth levels in arrivals. High Value Travellers (HVTs) represent approximately 36% of Indonesia’s out of region travel market.

### Drivers of Destination Choice
- #1 Nature & wildlife
- #2 Safety & security
- #3 Clean cities
- #4 Aquatic & coastal
- #5 Friendly & welcoming

### Australia’s Performance

#### Nature & Wildlife
- Australia (#1): 63%
- Japan: 60%
- Hawaii: 41%
- New Zealand: 39%
- France: 38%

#### Aquatic & Coastal
- Australia (#1): 59%
- Hawaii: 49%
- Japan: 39%
- New Zealand: 33%
- China: 19%

#### Food & Wine
- Japan: 71%
- France: 59%
- Italy: 51%
- Australia (#4): 48%
- South Korea: 43%

### Travel Attributes

#### Authenticity
- 94%
- seek authentic experiences through the local culture and getting a taste of everyday life.

#### Open-Minded
- 97%
- travel to become more openminded and knowledgeable about the world they live in.

#### Purposeful
- 90%
- look for purposeful travel where it allows them to give back to the destination they visit.

#### Fashionability
- 94%
- seek destinations that are fashionable and cool.

### 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

#### Booking Sources
- Online vs Offline: 87% use one or more online booking sources
- 54% use one or more offline booking sources
- Direct vs Indirect: 74% use one or more direct booking sources
- 84% 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. High Value Travellers (HVTs) represent approximately 36% of Japan’s out of region travel market.

HVT DEFINITION

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

CURRENT MARKET

- 0.5m Total arrivals at YE Dec 2018
- ~1 in 3 of these visitors are HVTs
- 2-3x more spend than average travellers

MARKET OPPORTUNITY

- 6.3m High Value Travellers in Japan
- 1.7m considering Australia in the next four years
- 4.6m not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

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

AUSTRALIA’S PERFORMANCE

- NATURE & WILDLIFE
  - Australia (#1): 76%
  - Canada: 48%
  - New Zealand: 47%
  - Switzerland: 40%
  - Hawaii: 36%

- AQUATIC & COASTAL
  - Australia (#1): 66%
  - Hawaii: 58%
  - Maldives: 56%
  - Caribbean: 44%
  - Fiji: 44%

- FOOD & WINE
  - Italy: 67%
  - France: 65%
  - Spain: 50%
  - Germany: 34%
  - Australia (#5): 33%

TRAVEL ATTRIBUTES

- AUTHENTICITY: 92%
  - seek authentic experiences through the local culture and getting a taste of everyday life.

- OPEN-MINDED: 91%
  - travel to become more openminded and knowledgeable about the world they live in.

- PURPOSEFUL: 66%
  - look for purposeful travel where it allows them to give back to the destination they visit.

- FASHIONABILITY: 86%
  - seek destinations that are fashionable and cool.

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME

- PLAN
  - 57% 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
  - 70% use one or more online booking sources
  - 39% use one or more offline booking sources

- DIRECT VS INDIRECT
  - 39% use one or more direct booking sources
  - 76% use one or more indirect booking sources

**HIGH VALUE TRAVELLER SNAPSHOT**

**MALAYSIA**

**MARKET OVERVIEW**

Malaysia remains a steady inbound market for Australia and market share continues to improve year-on-year. High Value Travellers (HVTs) represent approximately 39% of Malaysia’s out of region travel market.

### HVT DEFINITION

<table>
<thead>
<tr>
<th>Preference for Australia</th>
<th>Key drivers of destination choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel long haul</td>
<td>Represent high value</td>
</tr>
</tbody>
</table>

### CURRENT MARKET

- **0.4m** Total arrivals at YE Dec 2018
- ~1 in 4 of these visitors are HVTs
- 2-3x more spend than average travellers

### MARKET OPPORTUNITY

- **1.5m** High Value Travellers in Malaysia
- 0.9m considering Australia in the next four years
- 0.6m not considering Australia in the next four years

**Motivations for Travel**

**Drivers of Destination Choice**

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

**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>Hawaii</td>
<td>Australia (#1)</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Caribbean</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>Japan</td>
<td></td>
</tr>
<tr>
<td>Switzerland</td>
<td>Mauritius</td>
<td></td>
</tr>
<tr>
<td>Hawaii</td>
<td>38%</td>
<td></td>
</tr>
<tr>
<td>55%</td>
<td>37%</td>
<td></td>
</tr>
<tr>
<td>51%</td>
<td>28%</td>
<td></td>
</tr>
<tr>
<td>48%</td>
<td>27%</td>
<td></td>
</tr>
</tbody>
</table>

### Travel Attributes

**Authenticity**

97%

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

**Open-Minded**

98%

Travel to become more openminded and knowledgeable about the world they live in.

**Purposeful**

81%

Look for purposeful travel where it allows them to give back to the destination they visit.

**Fashionability**

92%

Seek destinations that are fashionable and cool.

**Planning and Booking Behaviour**

<table>
<thead>
<tr>
<th>Lead Time</th>
<th>Booking Sources</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Plan</strong></td>
<td>Online vs offline</td>
</tr>
<tr>
<td>50% plan their trips</td>
<td>79% use one or more online booking sources</td>
</tr>
<tr>
<td>3-6 months prior</td>
<td>3-6 months in advance</td>
</tr>
<tr>
<td><strong>Book</strong></td>
<td>40% book their trips</td>
</tr>
<tr>
<td><strong>Travel</strong></td>
<td>Peak travel season</td>
</tr>
<tr>
<td><strong>Source:</strong> Tourism Australia’s Consumer Demand Project July 2018, Australian Bureau of Statistics, Overseas Arrivals and Departures, December 2018, Tourism Research Australia, International Visitor Survey, December 2018, Department of Infrastructure and Regional Development, December 2018</td>
<td></td>
</tr>
</tbody>
</table>
In 2018, New Zealand was Australia’s second largest source market for international visitor arrivals, growing at 3% year-on-year. New Zealand is also fourth largest market in terms of total trip expenditure at $2.6bn. High Value Travellers (HVTs) represent approximately 33% of New Zealand’s out of region travel market.

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

**CURRENT MARKET**
- 1.3m Total arrivals at YE Dec 2018
- ~1 in 4 of these visitors are HVTs
- 2-3x more spend than average travellers

**MARKET OPPORTUNITY**
- 1.2m High Value Travellers in New Zealand
- 0.9m considering Australia in the next four years
- 0.3m not considering Australia in the next four years

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

**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>73%</td>
<td>86%</td>
<td>80%</td>
</tr>
<tr>
<td>Canada</td>
<td>Hawaii</td>
<td>Italy</td>
</tr>
<tr>
<td>55%</td>
<td>69%</td>
<td>73%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>Fiji</td>
<td>Australia (#3)</td>
</tr>
<tr>
<td>53%</td>
<td>61%</td>
<td>67%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>Maldives</td>
<td>Spain</td>
</tr>
<tr>
<td>49%</td>
<td>53%</td>
<td>59%</td>
</tr>
<tr>
<td>Italy</td>
<td>Caribbean</td>
<td>Greece</td>
</tr>
<tr>
<td>48%</td>
<td>49%</td>
<td>56%</td>
</tr>
</tbody>
</table>

**TRAVEL ATTRIBUTES**

<table>
<thead>
<tr>
<th>Authenticity</th>
<th>Open-Minded</th>
<th>Purposeful</th>
<th>Fashionability</th>
</tr>
</thead>
<tbody>
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<td>87%</td>
<td>90%</td>
<td>45%</td>
<td>63%</td>
</tr>
<tr>
<td>seek authentic experiences through the local culture and getting a taste of everyday life.</td>
<td>travel to become more openminded and knowledgeable about the world they live in.</td>
<td>look for purposeful travel where it allows them to give back to the destination they visit.</td>
<td>seek destinations that are fashionable and cool.</td>
</tr>
</tbody>
</table>

**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>49% plan their trips</td>
<td>67% use one or more online booking sources</td>
</tr>
<tr>
<td>3-6 months prior</td>
<td>51% book their trips</td>
</tr>
<tr>
<td>Book</td>
<td>Peak travel season</td>
</tr>
<tr>
<td>51% book their trips</td>
<td>Jul, Oct, Dec</td>
</tr>
<tr>
<td>Travel</td>
<td></td>
</tr>
<tr>
<td>Peak travel season</td>
<td></td>
</tr>
</tbody>
</table>

**MARKET OVERVIEW**

Singapore continues to be an important market for inbound arrivals and expenditure. The market is supported by a strong supply of direct flights and around 83% of visitors each year have previously travelled to Australia. High Value Travellers (HVTs) represent approximately 36% of Singapore's out of region travel market.

**HVT DEFINITION**
- Travel long haul
- Preference for Australia
- Key drivers of destination choice: Nature & wildlife, Safety & security, Food & wine, Value for money, Friendly & welcoming

**CURRENT MARKET**
- 0.4m Total arrivals at YE Dec 2018
- ~1 in 3 of these visitors are HVTs
- 2-3x more spend than average travellers

**MARKET OPPORTUNITY**
- 1.4m High Value Travellers in Singapore
- 0.7m considering Australia in the next four years
- 0.7m not considering Australia in the next four years

**DRIVERS OF DESTINATION CHOICE**
1. Nature & wildlife
2. Safety & security
3. Food & wine
4. Value for money
5. Friendly & welcoming

**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>66%</td>
<td>65%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>59%</td>
<td></td>
</tr>
<tr>
<td>Japan</td>
<td>56%</td>
<td>44%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>48%</td>
<td>40%</td>
</tr>
<tr>
<td>Scandinavia</td>
<td>40%</td>
<td>26%</td>
</tr>
</tbody>
</table>

| Australia (#2)    | 53%               |
| Japan             | 51%               |
| Hong Kong         | 51%               |
| France            | 45%               |

**AUTHENTICITY**

- 95% seek authentic experiences through the local culture and getting a taste of everyday life.

**OPEN-MINDED**

- 94% travel to become more openminded and knowledgeable about the world they live in.

**PURPOSEFUL**

- 71% look for purposeful travel where it allows them to give back to the destination they visit.

**FASHIONABILITY**

- 90% seek destinations that are fashionable and cool.

**PLANNING AND BOOKING BEHAVIOUR**

**LEAD TIME**
- PLAN: 52% plan their trips 3-6 months prior
- BOOK: 43% book their trips 3-6 months in advance
- TRAVEL: Peak travel season Nov-Dec

**BOOKING SOURCES**

<table>
<thead>
<tr>
<th>ONLINE VS OFFLINE</th>
<th>DIRECT VS INDIRECT</th>
</tr>
</thead>
<tbody>
<tr>
<td>86% use one or more online booking sources</td>
<td></td>
</tr>
<tr>
<td>32% use one or more offline booking sources</td>
<td></td>
</tr>
<tr>
<td>71% use one or more direct booking sources</td>
<td></td>
</tr>
<tr>
<td>53% use one or more indirect booking sources</td>
<td></td>
</tr>
</tbody>
</table>

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.

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

<table>
<thead>
<tr>
<th>Destination</th>
<th>Preference for Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>67%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>59%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>54%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>52%</td>
</tr>
<tr>
<td>Canada</td>
<td>44%</td>
</tr>
</tbody>
</table>

AQUATIC & COASTAL

<table>
<thead>
<tr>
<th>Destination</th>
<th>Preference for Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>63%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>59%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>41%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>41%</td>
</tr>
<tr>
<td>Maldives</td>
<td>39%</td>
</tr>
</tbody>
</table>

FOOD & WINE

<table>
<thead>
<tr>
<th>Country</th>
<th>Preference for Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>France</td>
<td>52%</td>
</tr>
<tr>
<td>Italy</td>
<td>48%</td>
</tr>
<tr>
<td>Australia</td>
<td>39%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>32%</td>
</tr>
<tr>
<td>Thailand</td>
<td>32%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Phase</th>
<th>Timeframe</th>
</tr>
</thead>
<tbody>
<tr>
<td>PLAN</td>
<td>3-6 months prior</td>
</tr>
<tr>
<td>BOOK</td>
<td>1-2 months in advance</td>
</tr>
<tr>
<td>TRAVEL</td>
<td>Dec-Mar</td>
</tr>
</tbody>
</table>

BOOKING SOURCES

ONLINE VS OFFLINE

<table>
<thead>
<tr>
<th>Booking Source</th>
<th>Preference for Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Online</td>
<td>70% use one or more online booking sources</td>
</tr>
<tr>
<td>Offline</td>
<td>46% use one or more offline booking sources</td>
</tr>
</tbody>
</table>

DIRECT VS INDIRECT

<table>
<thead>
<tr>
<th>Booking Source</th>
<th>Preference for Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Direct</td>
<td>42% use one or more direct booking sources</td>
</tr>
<tr>
<td>Indirect</td>
<td>79% use one or more indirect booking sources</td>
</tr>
</tbody>
</table>

HIGH VALUE TRAVELLER SNAPSHOT
UNITED KINGDOM

MARKET OVERVIEW
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 UK one of Tourism Australia’s most important source markets. High Value Travellers (HVTs) represent approximately 38% of the UK out of region travel market.

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

CURRENT MARKET
- 0.7m Total arrivals at YE Dec 2018
- ~1 in 4 of these visitors are HVTs
- 2-3x more spend than average travellers

MARKET OPPORTUNITY
- 7.9m High Value Travellers in the United Kingdom
- 2.4m considering Australia in the next four years
- 5.5m not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

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

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>New Zealand</td>
<td>#1</td>
</tr>
<tr>
<td>79%</td>
<td>63%</td>
<td>55%</td>
</tr>
<tr>
<td>Australia (#1)</td>
<td>Hawaii</td>
<td>USA</td>
</tr>
<tr>
<td>76%</td>
<td>54%</td>
<td>40%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Canada</td>
<td>New Zealand</td>
</tr>
<tr>
<td>53%</td>
<td>53%</td>
<td>40%</td>
</tr>
<tr>
<td>Caribbean</td>
<td>Hawaii</td>
<td>Caribbean</td>
</tr>
<tr>
<td></td>
<td>53%</td>
<td>35%</td>
</tr>
<tr>
<td>Indonesia/Bali</td>
<td></td>
<td>Hong Kong</td>
</tr>
<tr>
<td></td>
<td>48%</td>
<td>35%</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

TRAVEL ATTRIBUTES

AUTHENTICITY
- 92%
- Seek authentic experiences through the local culture and getting a taste of everyday life.

OPEN-MINDED
- 95%
- Travel to become more openminded and knowledgeable about the world they live in.

PURPOSEFUL
- 69%
- Look for purposeful travel where it allows them to give back to the destination they visit.

FASHIONABILITY
- 74%
- Seek destinations that are fashionable and cool.

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME
- PLAN
- 52% plan their trips
- 3-6 months prior
- BOOK
- 50% book their trips
- 3-6 months in advance
- TRAVEL
- Peak travel season
- Dec-Mar

BOOKING SOURCES

ONLINE VS OFFLINE
- 72% use one or more online booking sources
- 44% use one or more offline booking sources

DIRECT VS INDIRECT
- 46% use one or more direct booking sources
- 71% 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 USA one of Tourism Australia’s most important source markets. High Value Travellers (HVTs) represent approximately 39% of the US out of regional travel market.

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

**CURRENT MARKET**
- **0.8m**
  - Total arrivals at YE Dec 2018
  - ~1 in 4 of these visitors are HVTs
  - 2-3x more spend than average travellers

**MARKET OPPORTUNITY**
- **24.3m**
  - High Value Travellers in the USA
  - 7.4m considering Australia in the next four years
  - 16.9m not considering Australia in the next four years

**MOTIVATIONS FOR TRAVEL**

**DRIVERS OF DESTINATION CHOICE**
- #1 Nature & wildlife
- #2 Safety & security
- #3 Food & wine
- #4 Aquatic & coastal
- #5 History & heritage

**AUSTRALIA’S PERFORMANCE**

**NATURE & WILDLIFE**
- **Australia (1)**: 63%
- **New Zealand**: 59%
- **Italy**: 51%
- **Fiji**: 43%
- **Greece**: 43%

**AQUATIC & COASTAL**
- **Australia (1)**: 51%
- **New Zealand**: 44%
- **Brazil**: 35%
- **Fiji**: 29%
- **Italy**: 35%

**FOOD & WINE**
- **Italy**: 78%
- **France**: 70%
- **Germany**: 45%
- **Spain**: 45%
- **Australia (7)**: 37%

**TRAVEL ATTRIBUTES**

**AUTHENTICITY**
- 94%
  - seek authentic experiences through the local culture and getting a taste of everyday life.

**OPEN-MINDED**
- 92%
  - travel to become more openminded and knowledgeable about the world they live in.

**PURPOSEFUL**
- 61%
  - look for purposeful travel where it allows them to give back to the destination they visit.

**FASHIONABILITY**
- 85%
  - seek destinations that are fashionable and cool.

**PLANNING AND BOOKING BEHAVIOUR**

**LEAD TIME**

- **PLAN**
  - 43% plan their trips
  - 3-6 months prior

- **BOOK**
  - 43% book their trips
  - 3-6 months in advance

- **TRAVEL**
  - Peak travel season
  - Dec-Mar

**BOOKING SOURCES**

**ONLINE VS OFFLINE**
- 72% use one or more online booking sources
- 48% use one or more offline booking sources

**DIRECT VS INDIRECT**
- 58% use one or more direct booking sources
- 61% use one or more indirect booking sources