



MARKET OVERVIEW

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.

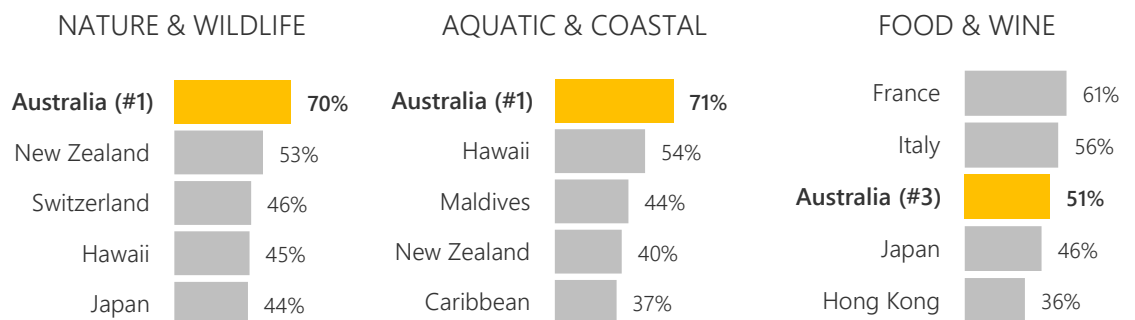
HVT DEFINITION	CURRENT MARKET	MARKET OPPORTUNITY
<p>Travel long haul</p>  <p>Preference for Australia</p>  <p>Key drivers of destination choice</p>  <p>Represent high value</p> 	<p>9.2m</p> <p>Total arrivals at YE Dec 2018</p> <p>~1 in 4 of these visitors are HVTs</p> <p>2-3x more spend than average travellers</p>	<p>80m+</p> <p>High Value Travellers globally</p> <p>32m+ considering Australia in the next four years</p> <p>49m+ not considering Australia in the next four years</p>

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

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








AUSTRALIA'S PERFORMANCE



TRAVEL ATTRIBUTES

AUTHENTICITY	OPEN-MINDED	PURPOSEFUL	FASHIONABILITY
93%	94%	73%	81%
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			BOOKING SOURCES	
<p>PLAN</p> <p>44% plan their trips</p>  <p>3-6 months prior</p>	<p>BOOK</p> <p>38% book their trips</p>  <p>3-6 months in advance</p>	<p>TRAVEL</p> <p>Peak travel season</p>  <p>February, December</p>	<p>ONLINE VS OFFLINE</p>  <p>77% use one or more online booking sources</p>  <p>46% use one or more offline booking sources</p>	<p>DIRECT VS INDIRECT</p>  <p>59% use one or more direct booking sources</p>  <p>71% use one or more indirect booking sources</p>

HIGH VALUE TRAVELLER SNAPSHOT

CHINA



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.

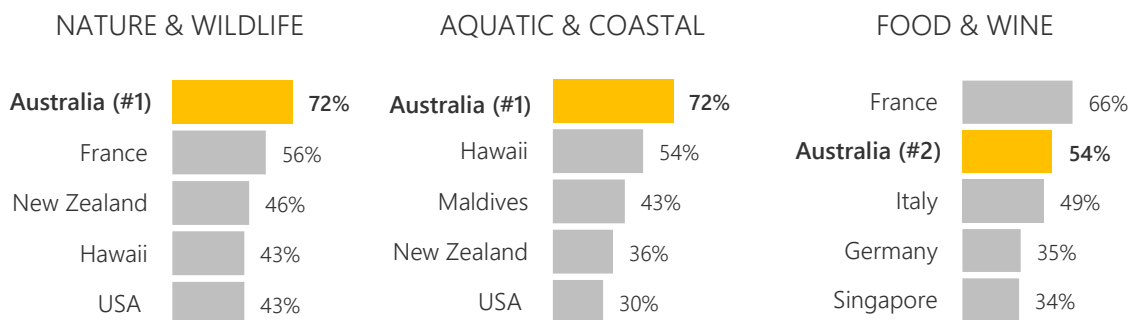
HVT DEFINITION	CURRENT MARKET	MARKET OPPORTUNITY
<p>Travel long haul</p> <p>Preference for Australia</p> <p>Key drivers of destination choice</p> <p>Represent high value</p>	<p>1.4m</p> <p>Total arrivals at YE Dec 2018</p> <p>~1 in 3 of these visitors are HVTs</p> <p>2-3x more spend than average travellers</p>	<p>20.4m</p> <p>High Value Travellers in China</p> <p>10.8m considering Australia in the next four years</p> <p>9.6m not considering Australia in the next four years</p>

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

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

AUSTRALIA'S PERFORMANCE



TRAVEL ATTRIBUTES

AUTHENTICITY

97%

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

94%

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			BOOKING SOURCES	
<p>PLAN</p> <p>60% plan their trips</p> <p>1-2 months prior</p>	<p>BOOK</p> <p>60% book their trips</p> <p>1-2 months in advance</p>	<p>TRAVEL</p> <p>Peak travel season</p> <p>Jan-Feb</p>	<p>ONLINE VS OFFLINE</p> <p>85% use one or more online booking sources</p> <p>39% use one or more offline booking sources</p>	<p>DIRECT VS INDIRECT</p> <p>54% use one or more direct booking sources</p> <p>79% use one or more indirect booking sources</p>

Source: 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



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	CURRENT MARKET	MARKET OPPORTUNITY
<p>Travel long haul</p>  <p>Preference for Australia</p>  <p>Key drivers of destination choice</p>  <p>Represent high value</p> 	<p>0.2m</p> <p>Total arrivals at YE Dec 2018</p> <p>~1 in 3 of these visitors are HVTs</p> <p>2-3x more spend than average travellers</p>	<p>5.5m</p> <p>High Value Travellers in Germany</p> <p>1.6m considering Australia in the next four years</p> <p>3.9m not considering Australia in the next four years</p>

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE	AUSTRALIA'S PERFORMANCE		
<p>#1 Nature & wildlife</p> <p>#2 Safety & security</p> <p>#3 Aquatic & coastal</p> <p>#4 Food & wine</p> <p>#5 Friendly & welcoming</p>	<p>NATURE & WILDLIFE</p> <p>Australia (#1) 74%</p> <p>New Zealand 72%</p> <p>Caribbean 58%</p> <p>Canada 57%</p> <p>Hawaii 56%</p>	<p>AQUATIC & COASTAL</p> <p>Australia (#1) 76%</p> <p>Caribbean 71%</p> <p>Mauritius 62%</p> <p>Hawaii 50%</p> <p>Maldives 55%</p>	<p>FOOD & WINE</p> <p>Thailand 42%</p> <p>Japan 38%</p> <p>Argentina 35%</p> <p>Caribbean 34%</p> <p>Mexico 32%</p> <p>Australia (#8) 26%</p>

TRAVEL ATTRIBUTES

AUTHENTICITY	OPEN-MINDED	PURPOSEFUL	FASHIONABILITY
95%	89%	70%	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.

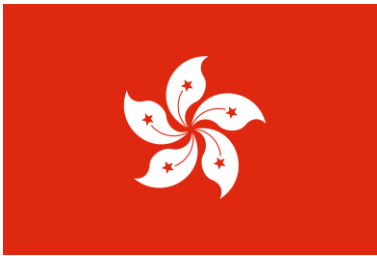
PLANNING AND BOOKING BEHAVIOUR

LEAD TIME			BOOKING SOURCES	
<p>PLAN</p> <p>59% plan their trips</p> <p>3-6 months prior</p>	<p>BOOK</p> <p>58% book their trips</p> <p>3-6 months in advance</p>	<p>TRAVEL</p> <p>Peak travel season</p> <p>Dec-Mar</p>	<p>ONLINE VS OFFLINE</p> <p>60% use one or more online booking sources</p> <p>49% use one or more offline booking sources</p>	<p>DIRECT VS INDIRECT</p> <p>41% use one or more direct booking sources</p> <p>76% use one or more indirect booking sources</p>

Source: 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

HIGH VALUE TRAVELLER SNAPSHOT

HONG KONG



MARKET OVERVIEW

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.

HVT DEFINITION	CURRENT MARKET	MARKET OPPORTUNITY
<p>Travel long haul</p> <p>Preference for Australia</p> <p>Key drivers of destination choice</p> <p>Represent high value</p>	<p>0.3m</p> <p>Total arrivals at YE Dec 2018</p> <p>~1 in 3 of these visitors are HVTs</p> <p>2-3x more spend than average travellers</p>	<p>1.1m</p> <p>High Value Travellers in Hong Kong</p> <p>0.55m considering Australia in the next four years</p> <p>0.55m not considering Australia in the next four years</p>

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE	AUSTRALIA'S PERFORMANCE						
<ul style="list-style-type: none"> #1 Nature & wildlife #2 Safety % security #3 Food & wine #4 Value for money #5 Clean cities 	<table border="1"> <thead> <tr> <th>NATURE & WILDLIFE</th> <th>AQUATIC & COASTAL</th> <th>FOOD & WINE</th> </tr> </thead> <tbody> <tr> <td> <p>Australia (#1) 68%</p> <p>Switzerland 52%</p> <p>New Zealand 49%</p> <p>Scandinavia 42%</p> <p>Greece 41%</p> </td> <td> <p>Australia (#1) 76%</p> <p>Hawaii 54%</p> <p>Maldives 53%</p> <p>Caribbean 45%</p> <p>Guam 40%</p> </td> <td> <p>France 57%</p> <p>Thailand 47%</p> <p>Australia (#3) 46%</p> <p>Italy 46%</p> <p>Singapore 35%</p> </td> </tr> </tbody> </table>	NATURE & WILDLIFE	AQUATIC & COASTAL	FOOD & WINE	<p>Australia (#1) 68%</p> <p>Switzerland 52%</p> <p>New Zealand 49%</p> <p>Scandinavia 42%</p> <p>Greece 41%</p>	<p>Australia (#1) 76%</p> <p>Hawaii 54%</p> <p>Maldives 53%</p> <p>Caribbean 45%</p> <p>Guam 40%</p>	<p>France 57%</p> <p>Thailand 47%</p> <p>Australia (#3) 46%</p> <p>Italy 46%</p> <p>Singapore 35%</p>
NATURE & WILDLIFE	AQUATIC & COASTAL	FOOD & WINE					
<p>Australia (#1) 68%</p> <p>Switzerland 52%</p> <p>New Zealand 49%</p> <p>Scandinavia 42%</p> <p>Greece 41%</p>	<p>Australia (#1) 76%</p> <p>Hawaii 54%</p> <p>Maldives 53%</p> <p>Caribbean 45%</p> <p>Guam 40%</p>	<p>France 57%</p> <p>Thailand 47%</p> <p>Australia (#3) 46%</p> <p>Italy 46%</p> <p>Singapore 35%</p>					

TRAVEL ATTRIBUTES

AUTHENTICITY	OPEN-MINDED	PURPOSEFUL	FASHIONABILITY
<p>93%</p> <p>seek authentic experiences through the local culture and getting a taste of everyday life.</p>	<p>94%</p> <p>travel to become more openminded and knowledgeable about the world they live in.</p>	<p>73%</p> <p>look for purposeful travel where it allows them to give back to the destination they visit.</p>	<p>89%</p> <p>seek destinations that are fashionable and cool.</p>

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME			BOOKING SOURCES	
<p>PLAN</p> <p>43% plan their trips</p> <p>3-6 months prior</p>	<p>BOOK</p> <p>41% book their trips</p> <p>1-2 months in advance</p>	<p>TRAVEL</p> <p>Peak travel season</p> <p>Feb-Mar December</p>	<p>ONLINE VS OFFLINE</p> <p>77% use one or more online booking sources</p> <p>38% use one or more offline booking sources</p>	<p>DIRECT VS INDIRECT</p> <p>63% use one or more direct booking sources</p> <p>65% use one or more indirect booking sources</p>

Source: 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

HIGH VALUE TRAVELLER SNAPSHOT

INDIA

MARKET OVERVIEW



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.

HVT DEFINITION

Travel long haul



Preference for Australia



Key drivers of destination choice



Represent high value



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

2.7m

High Value Travellers in India

1.5m

considering Australia in the next four years

1.2m

considering Australia beyond four years

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE



#1 Nature & wildlife



#2 Aquatic & coastal



#3 Safety & security



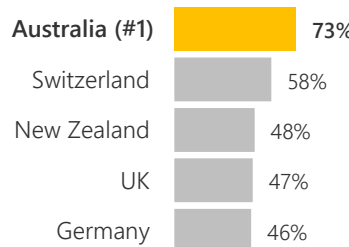
#4 Food & wine



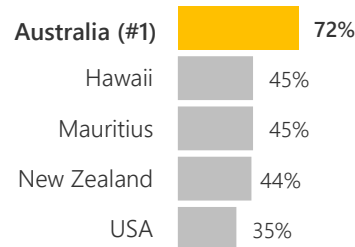
#5 Family friendly

AUSTRALIA'S PERFORMANCE

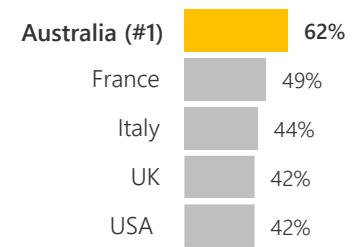
NATURE & WILDLIFE



AQUATIC & COASTAL



FOOD & WINE



TRAVEL ATTRIBUTES

AUTHENTICITY

93%

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

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



BOOK

47% book their trips



TRAVEL

Peak travel season



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

MARKET OVERVIEW

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.

HVT DEFINITION

Travel long haul



Preference for Australia



Key drivers of destination choice



Represent high value



CURRENT MARKET

0.2m

Total arrivals at YE Dec 2018

~1 in 5

of these visitors are HVTs

2-3x

more spend than average travellers

MARKET OPPORTUNITY

1.2m

High Value Travellers in Indonesia

0.5m

considering Australia in the next four years

0.7m

not considering Australia in the next four years

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE



#1 Nature & wildlife



#2 Safety & security



#3 Clean cities



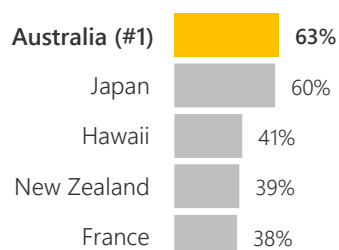
#4 Aquatic & coastal



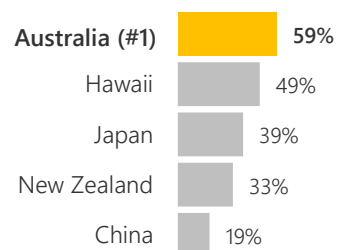
#5 Friendly & welcoming

AUSTRALIA'S PERFORMANCE

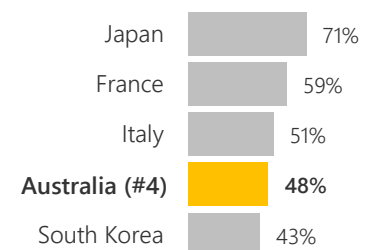
NATURE & WILDLIFE



AQUATIC & COASTAL



FOOD & WINE



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



BOOK

34% book their trips



TRAVEL

Peak travel season



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

HIGH VALUE TRAVELLER SNAPSHOT

JAPAN



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



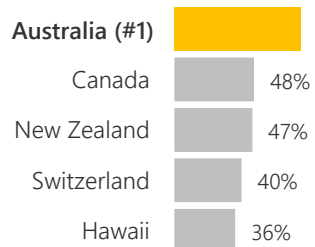
#4 Value for money



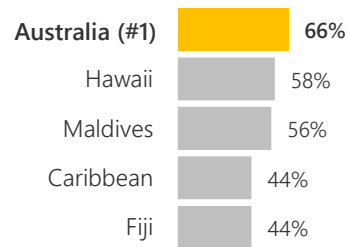
#5 History & heritage

AUSTRALIA'S PERFORMANCE

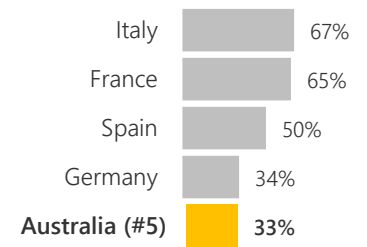
NATURE & WILDLIFE



AQUATIC & COASTAL



FOOD & WINE



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



BOOK

46% book their trips



TRAVEL

Peak travel season



BOOKING SOURCES

ONLINE VS OFFLINE



70% use one or more online booking sources



39% use one or more offline booking sources

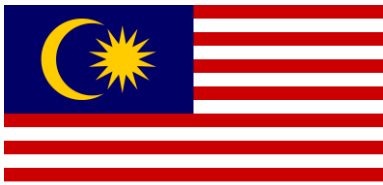
DIRECT VS INDIRECT



39% use one or more direct booking sources



76% use one or more indirect booking sources



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	CURRENT MARKET	MARKET OPPORTUNITY
<p>Travel long haul</p>  <p>Preference for Australia</p>  <p>Key drivers of destination choice</p>  <p>Represent high value</p> 	<p>0.4m</p> <p>Total arrivals at YE Dec 2018</p> <p>~1 in 4 of these visitors are HVTs</p> <p>2-3x more spend than average travellers</p>	<p>1.5m</p> <p>High Value Travellers in Malaysia</p> <p>0.9m considering Australia in the next four years</p> <p>0.6m not considering Australia in the next four years</p>








MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE	AUSTRALIA'S PERFORMANCE																		
<ul style="list-style-type: none"> #1 Nature & wildlife #2 Safety & security #3 Food & wine #4 Value for money #5 Aquatic & coastal 	<table border="1"> <thead> <tr> <th>NATURE & WILDLIFE</th> <th>AQUATIC & COASTAL</th> <th>FOOD & WINE</th> </tr> </thead> <tbody> <tr> <td>Australia (#1) 65%</td> <td>Australia (#1) 67%</td> <td>Australia (#1) 62%</td> </tr> <tr> <td>New Zealand 55%</td> <td>Hawaii 47%</td> <td>Japan 51%</td> </tr> <tr> <td>Japan 51%</td> <td>Caribbean 37%</td> <td>France 50%</td> </tr> <tr> <td>Switzerland 48%</td> <td>Japan 28%</td> <td>Italy 48%</td> </tr> <tr> <td>Hawaii 38%</td> <td>Mauritius 27%</td> <td>Hong Kong 46%</td> </tr> </tbody> </table>	NATURE & WILDLIFE	AQUATIC & COASTAL	FOOD & WINE	Australia (#1) 65%	Australia (#1) 67%	Australia (#1) 62%	New Zealand 55%	Hawaii 47%	Japan 51%	Japan 51%	Caribbean 37%	France 50%	Switzerland 48%	Japan 28%	Italy 48%	Hawaii 38%	Mauritius 27%	Hong Kong 46%
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TRAVEL ATTRIBUTES

AUTHENTICITY	OPEN-MINDED	PURPOSEFUL	FASHIONABILITY
97%	98%	81%	92%
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.

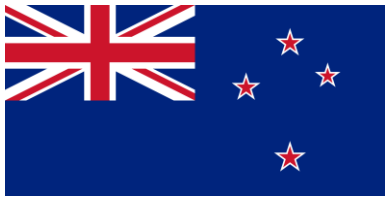
PLANNING AND BOOKING BEHAVIOUR

LEAD TIME			BOOKING SOURCES	
<p>PLAN</p> <p>50% plan their trips</p>  <p>3-6 months prior</p>	<p>BOOK</p> <p>40% book their trips</p>  <p>3-6 months in advance</p>	<p>TRAVEL</p> <p>Peak travel season</p>  <p>August Nov-Dec</p>	<p>ONLINE VS OFFLINE</p>  <p>79% use one or more online booking sources</p>  <p>51% use one or more offline booking sources</p>	<p>DIRECT VS INDIRECT</p>  <p>75% use one or more direct booking sources</p>  <p>66% use one or more indirect booking sources</p>

Source: 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

HIGH VALUE TRAVELLER SNAPSHOT

NEW ZEALAND



MARKET OVERVIEW

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.

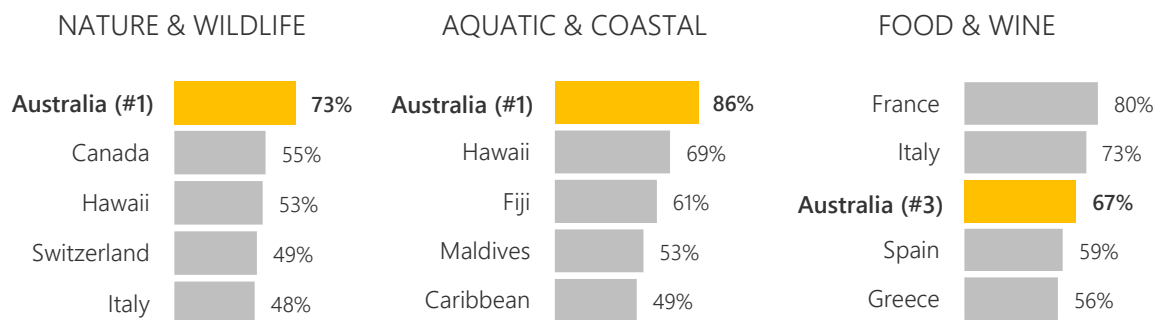
HVT DEFINITION	CURRENT MARKET	MARKET OPPORTUNITY
<p>Travel long haul</p> <p>Preference for Australia</p> <p>Key drivers of destination choice</p> <p>Represent high value</p>	<p>1.3m</p> <p>Total arrivals at YE Dec 2018</p> <p>~1 in 4 of these visitors are HVTs</p> <p>2-3x more spend than average travellers</p>	<p>1.2m</p> <p>High Value Travellers in New Zealand</p> <p>0.9m considering Australia in the next four years</p> <p>0.3m not considering Australia in the next four years</p>

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE

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

AUSTRALIA'S PERFORMANCE



TRAVEL ATTRIBUTES

AUTHENTICITY

87%

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

OPEN-MINDED

90%

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

PURPOSEFUL

45%

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

FASHIONABILITY

63%

seek destinations that are fashionable and cool.

PLANNING AND BOOKING BEHAVIOUR

LEAD TIME			BOOKING SOURCES	
<p>PLAN</p> <p>49% plan their trips</p> <p>3-6 months prior</p>	<p>BOOK</p> <p>51% book their trips</p> <p>3-6 months in advance</p>	<p>TRAVEL</p> <p>Peak travel season</p> <p>Jul, Oct, Dec</p>	<p>ONLINE VS OFFLINE</p> <p>67% use one or more online booking sources</p> <p>49% use one or more offline booking sources</p>	<p>DIRECT VS INDIRECT</p> <p>59% use one or more direct booking sources</p> <p>62% use one or more indirect booking sources</p>

Source: 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

HIGH VALUE TRAVELLER SNAPSHOT

SINGAPORE



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



Represent high value



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

MOTIVATIONS FOR TRAVEL

DRIVERS OF DESTINATION CHOICE



#1 Nature & wildlife



#2 Safety & security



#3 Food & wine



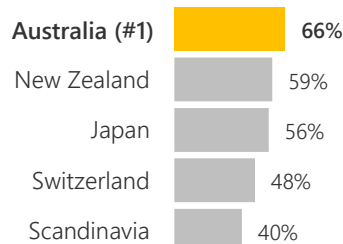
#4 Value for money



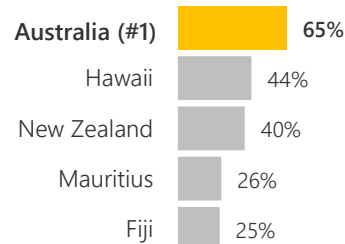
#5 Friendly & welcoming

AUSTRALIA'S PERFORMANCE

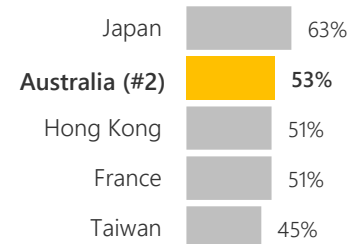
NATURE & WILDLIFE



AQUATIC & COASTAL



FOOD & WINE



TRAVEL ATTRIBUTES

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



BOOK

43% book their trips



TRAVEL

Peak travel season



BOOKING SOURCES

ONLINE VS OFFLINE



86% use one or more online booking sources



32% use one or more offline booking sources

DIRECT VS INDIRECT



71% use one or more direct booking sources



53% 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



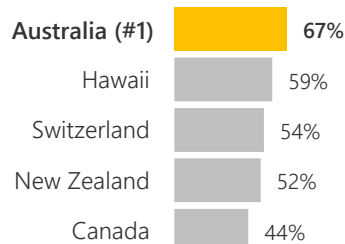
#4 History & heritage



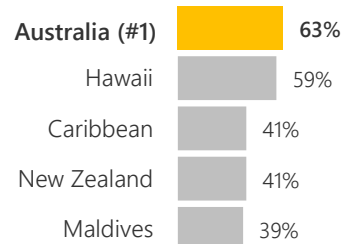
#5 Value for money

AUSTRALIA'S PERFORMANCE

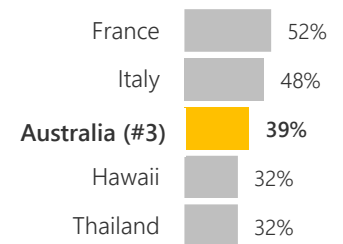
NATURE & WILDLIFE



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

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



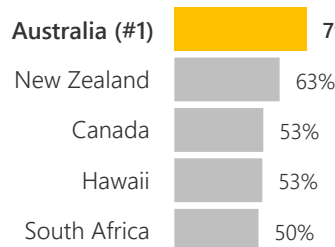
#4 Food & wine



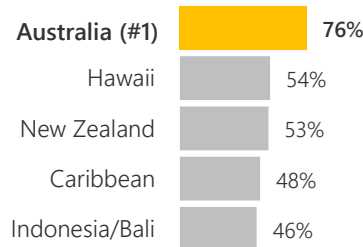
#5 History & heritage

AUSTRALIA'S PERFORMANCE

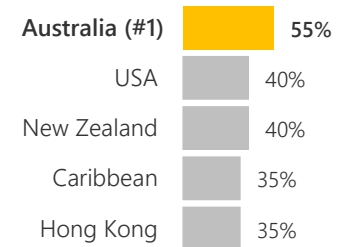
NATURE & WILDLIFE



AQUATIC & COASTAL



FOOD & WINE



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



BOOK

50% book their trips



TRAVEL

Peak travel season



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

HIGH VALUE TRAVELLER SNAPSHOT

UNITED STATES OF AMERICA



MARKET OVERVIEW

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



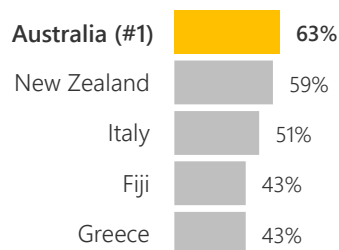
#4 Aquatic & coastal



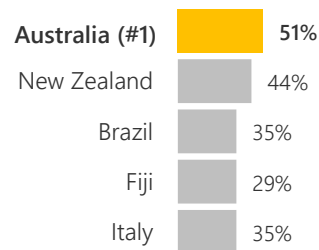
#5 History & heritage

AUSTRALIA'S PERFORMANCE

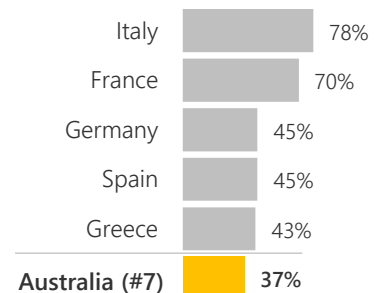
NATURE & WILDLIFE



AQUATIC & COASTAL



FOOD & WINE



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



BOOK

43% book their trips



TRAVEL

Peak travel season



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