

HIGH VALUE TRAVELLER FACT SHEET 2020

UNITED STATES OF AMERICA

Whether you're talking about a tourism destination, hotel, or travel brand, it's difficult to market across entire generations of travellers. It's more effective to identify psychographic segments - types of travellers who, regardless of age or gender, share similar attitudes, interests and behaviours.

Tourism Australia has embarked on a journey to transition from predominantly demographically defined and based target audiences across markets, to a global behavioural and attitudinal target audience. This transformation is underpinned by the development of the High Value Traveller (HVT) segment.

DEFINITION OF A HIGH VALUE TRAVELLER



TRAVEL LONG HAUL

Travels long haul (out of region) on a regular basis.



PREFERENCE FOR AUSTRALIA

Consideration to visit Australia in the short or long term.



KEY DRIVERS FOR DESTINATION CHOICE

Food and wine, aquatic and coastal, and nature and wildlife experiences are key drivers when choosing a holiday destination.



REPRESENT HIGH VALUE

Above average trip expenditure. Higher likelihood to stay longer. Higher likelihood to disperse further.

High Value Travellers (HVTs) are empowered and increasingly knowledgeable about the world around them. They know what they want, when they want it and where they want to get it. As such, HVTs view knowledge about a destination as fundamental to an enriching travel experience. That experience starts well before they board a ship or plane, but rather as they seek out and discover new travel content online.

So when it comes to travel, HVTs prefer authentic holidays where they can experience the local culture and get a taste of everyday life. With their eyes, ears and mind wide open, they travel to expand their horizons to become more knowledgeable of the world we live in. This means getting a taste for everything from the local cuisine to the natural surroundings. Especially when it's a destination they've not yet travelled to.



24.3M

High Value Travellers in the United States

of which
7.4M

are considering visiting Australia in the next four years

and a further
16.9M

not considering Australia in the next four years

DID YOU KNOW?



96% Enjoy escaping day-to-day life when travelling



95% Travel to enrich their knowledge of the world



95% Like to get a taste for the local cuisine when travelling



95% Travel to become more open-minded of the world



92% Feel now is the right time to travel to escape the pressures of modern life



represents

~40%

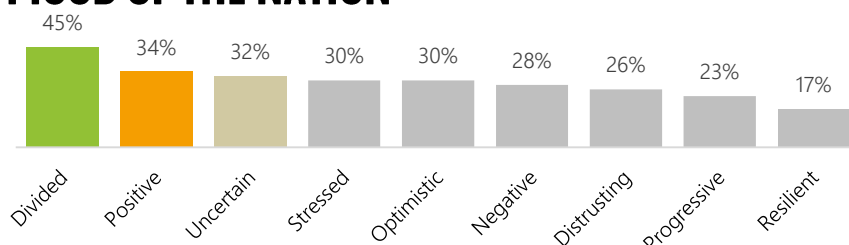
of the USA long haul travel market



Staying an average

9 NIGHTS

MOOD OF THE NATION

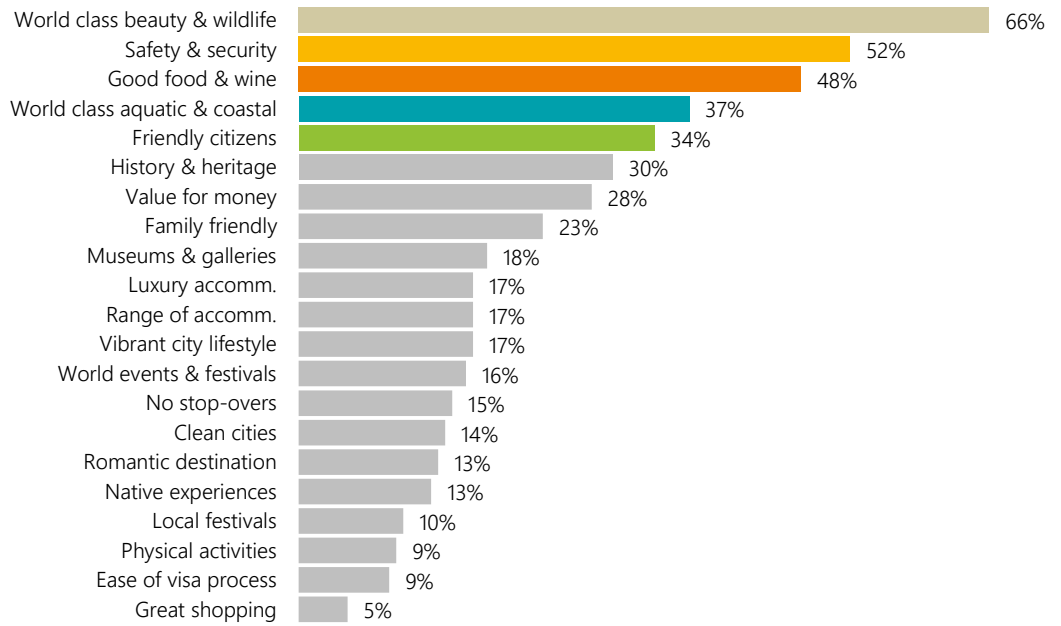


Spending

2-3X

more than the average traveller₁

DRIVERS OF DESTINATION CHOICE

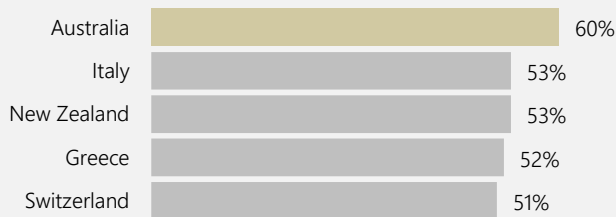


Read as: 66% of USA HVTs state beauty and wildlife is the most important driver for destination choice.

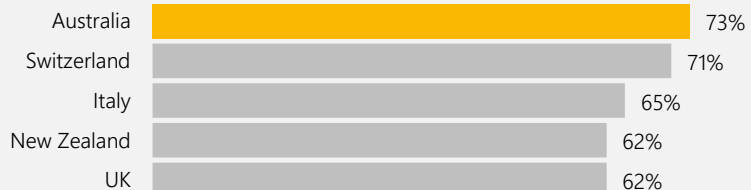
AUSTRALIA'S ASSOCIATION TO DRIVERS OF DESTINATION CHOICE



NATURE AND WILDLIFE



SAFETY AND SECURITY



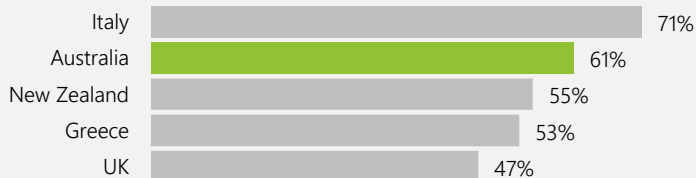
GOOD FOOD AND WINE



AQUATIC AND COASTAL



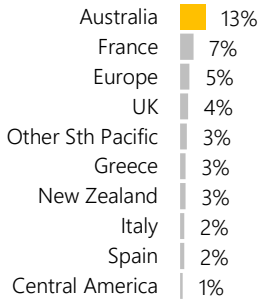
FRIENDLY CITIZENS



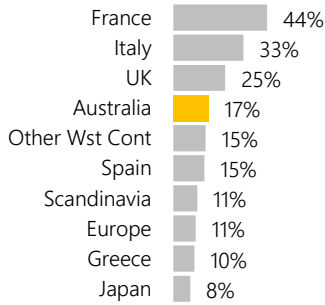
Read as: 60% of USA HVTs associate Australia as the top destination for nature and wildlife.

DEMAND FOR AUSTRALIA

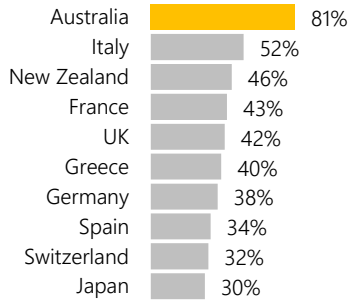
MOST DESIRABLE DESTINATIONS



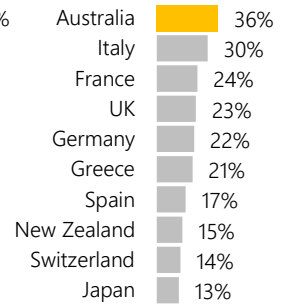
MOST FASHIONABLE DESTINATIONS



CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



INTENTION TO VISIT (IN THE NEXT 2 YEARS)

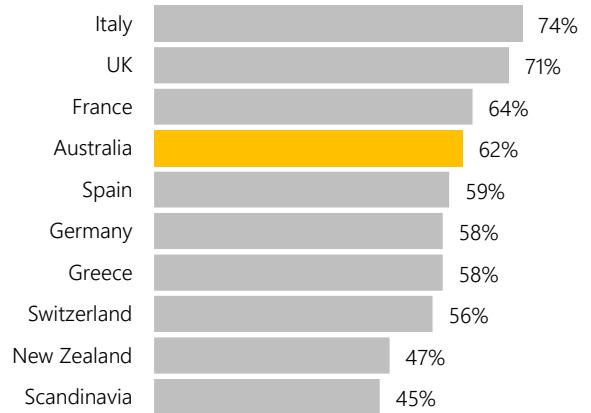


Read as: 13% of USA HVTs state Australia is their most desirable destination.



Tidbinbilla Nature Reserve, Australian Capital Territory

AWARENESS OF HOLIDAY EXPERIENCES



✓ DRIVERS FOR CHOOSING AUSTRALIA



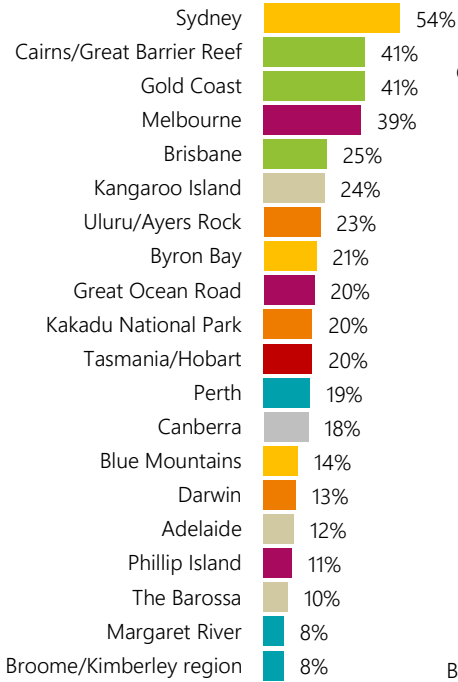
⚠ BARRIERS FOR NOT CHOOSING AUSTRALIA



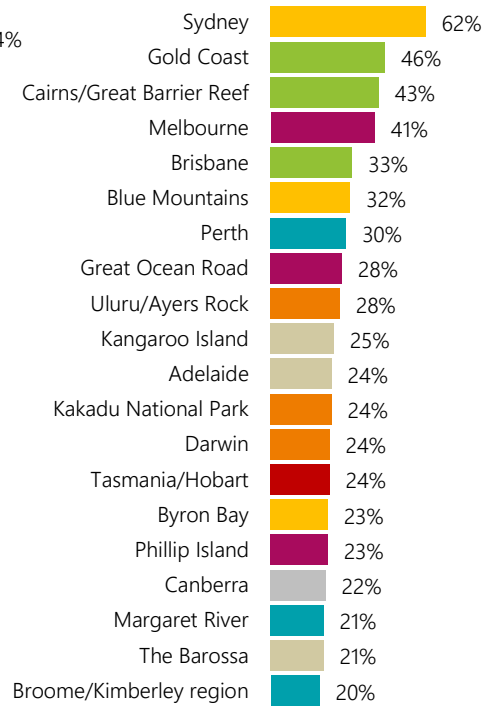
Read as: 67% of USA HVTs identify Australia as an exciting place to travel to as a key driver for selection.

DEMAND FOR AUSTRALIA

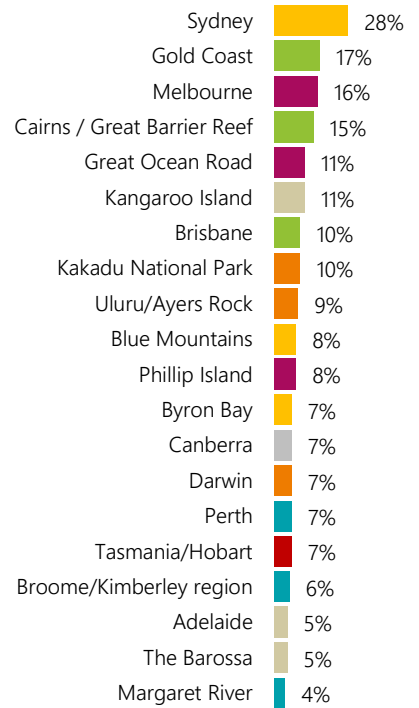
CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



AWARENESS OF EXPERIENCES WITHIN AUSTRALIAN DESTINATIONS



INTENTION TO VISIT (IN THE NEXT 2 YEARS)



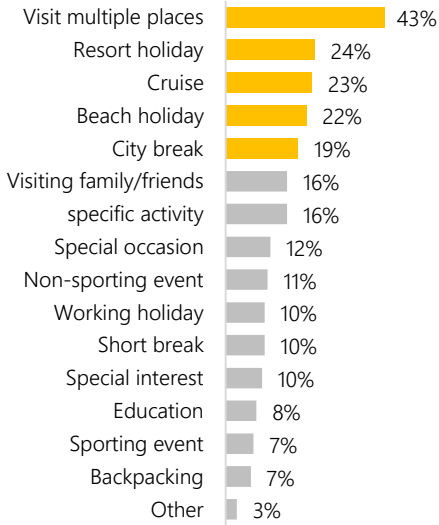
Read as: Of all USA HVTs considering Australia, 54% are considering visiting Sydney in the next 4 years.



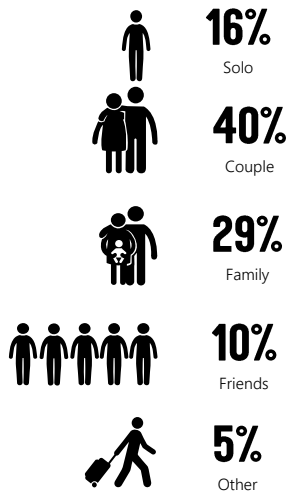
Skull Rock, Wilsons Promontory, Victoria

TRIP BEHAVIOUR

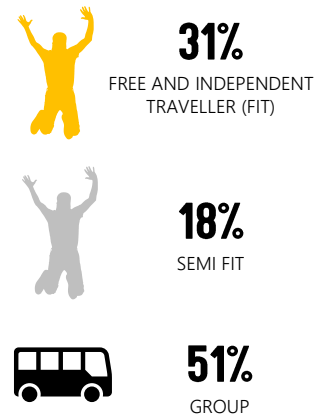
TRIP TYPE



TRAVEL PARTY

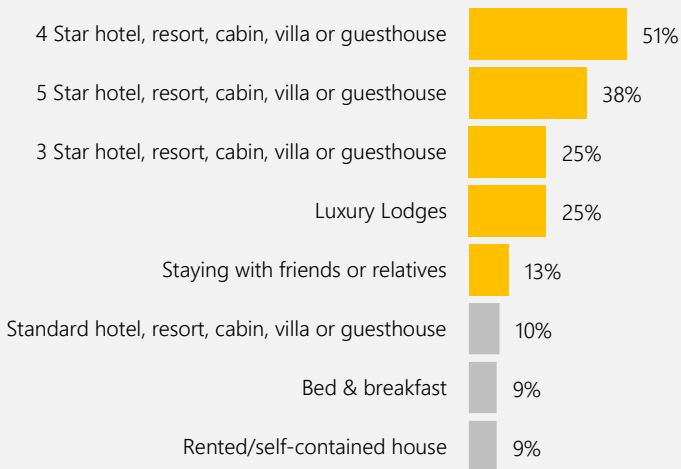


TRAVEL STYLE



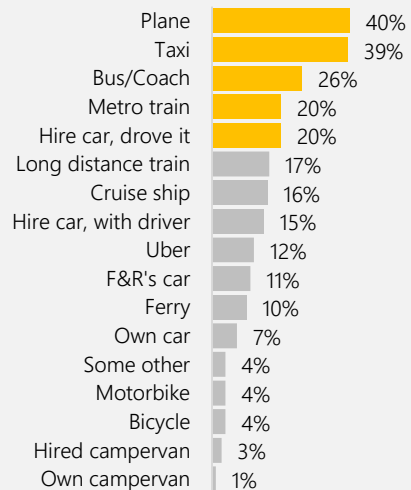
Read as: 43% of US HVTs visited multiple places on their last holiday.

ACCOMMODATION TYPE

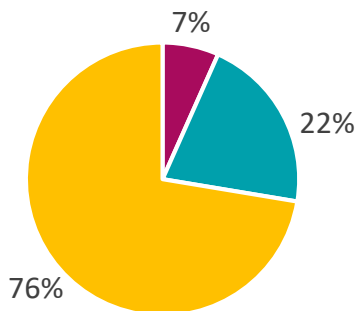


Read as: 51% of USA HVTs prefer 4-star accommodation.

TRANSPORT

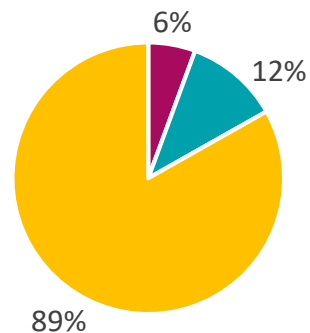


BOOKING LEAD TIME FOR ACCOMMODATION



- Booked while on my trip
- Booked not long before my trip
- Booked well in advance of my trip

BOOKING LEAD TIME FOR FLIGHTS

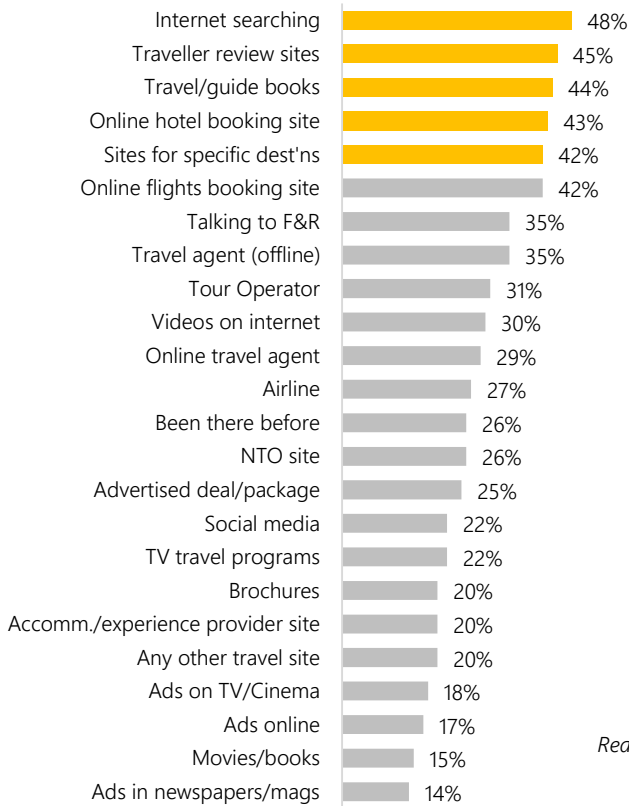


- Booked while on my trip
- Booked not long before my trip
- Booked well in advance of my trip

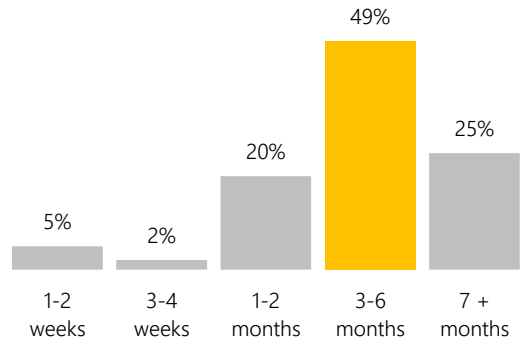
Read as: 76% of US HVTs book their accommodation well in advance.

PLANNING AND BOOKING

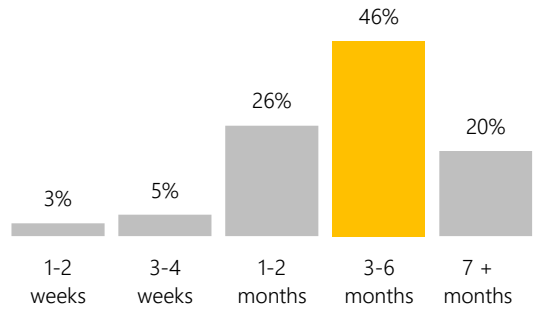
PLANNING SOURCES



DESTINATION CHOICE LEAD TIME

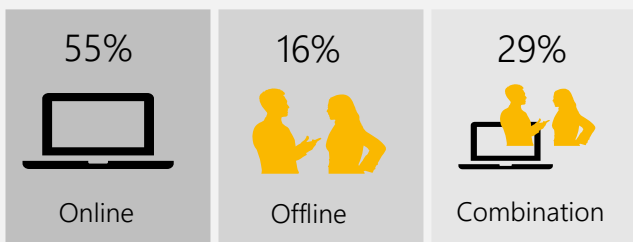


BOOKING LEAD TIME



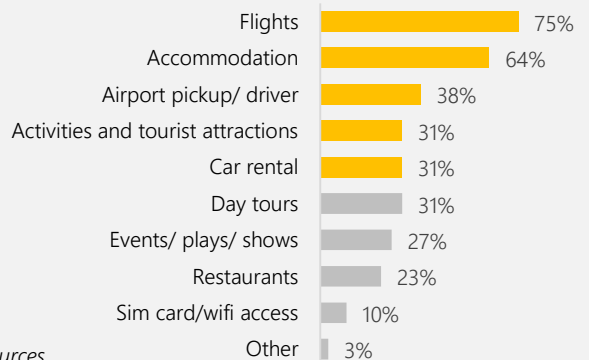
Read as: 49% of USA HVTs select a destination 3-6 months before they travel.

ONLINE VS. OFFLINE BOOKING

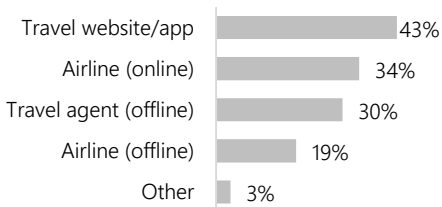


Read as: 55% of USA HVTs book online, while 16% book through offline sources.

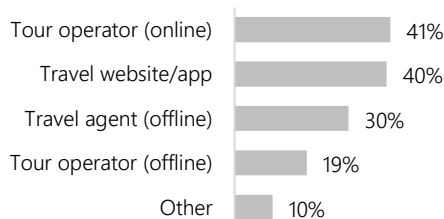
BOOKED PRIOR TO DEPARTURE



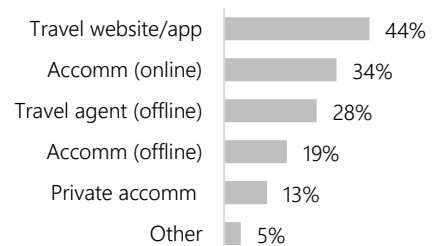
FLIGHT BOOKINGS



TOUR BOOKINGS



ACCOMODATION BOOKINGS



Read as: 43% of USA HVTs booked flights through a travel website/app for their last trip.