

HIGH VALUE TRAVELLER FACT SHEET 2020

UNITED KINGDOM

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.



7.9M

High Value Travellers in the United Kingdom

of which
2.4M

are considering visiting Australia in the next four years

and a further
5.5M

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



94% Prefer to holiday in a natural setting



93% Consider the seasonality of a destination when planning a holiday



represents

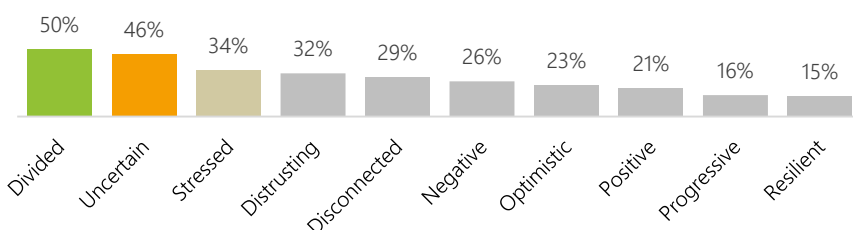
~41%

of the UK long haul travel market



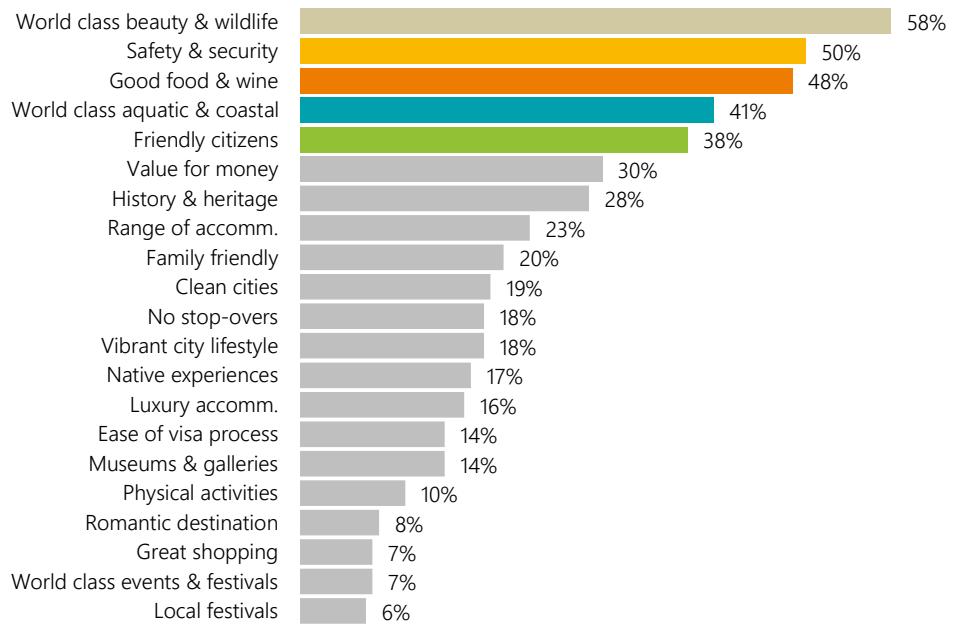
Staying an average
13 NIGHTS

MOOD OF THE NATION



Spending
2-3X
more than the average traveller₁

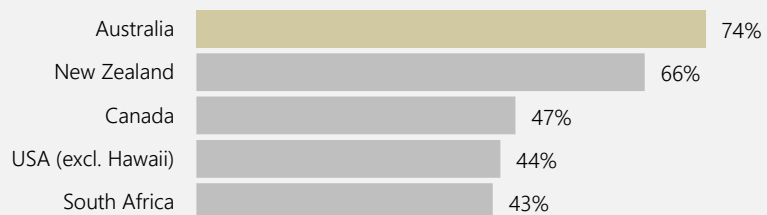
DRIVERS OF DESTINATION CHOICE



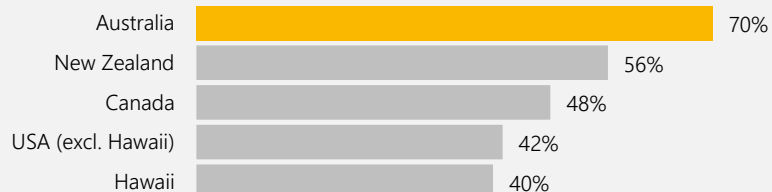
Read as: 58% of UK HVTs state beauty and wildlife is the most important driver for destination choice.

AUSTRALIA'S ASSOCIATION TO DRIVERS OF DESTINATION CHOICE

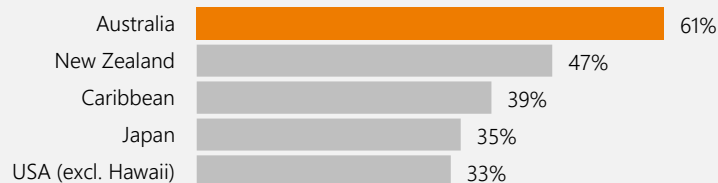
NATURE & WILDLIFE



SAFETY & SECURITY



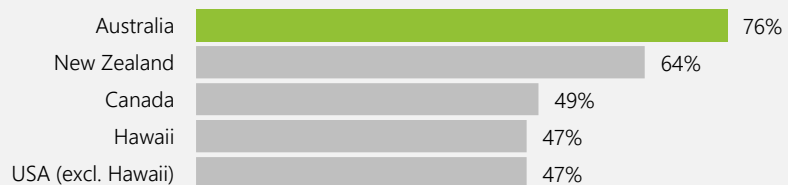
GOOD FOOD & WINE



AQUATIC & COASTAL



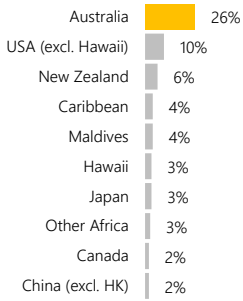
FRIENDLY CITIZENS



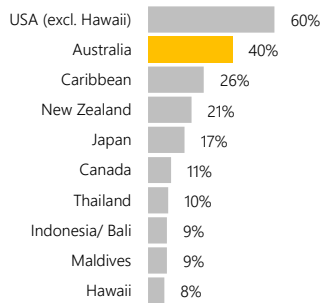
Read as: 74% of UK HVTs associate Australia as the top destination for nature and wildlife.

DEMAND FOR AUSTRALIA

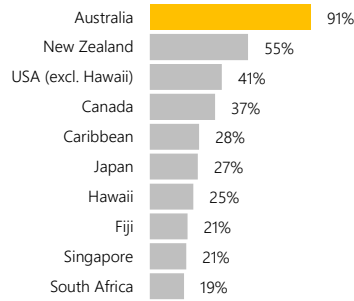
MOST DESIRABLE DESTINATIONS



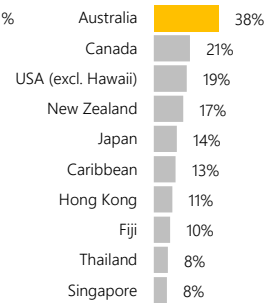
MOST FASHIONABLE DESTINATIONS



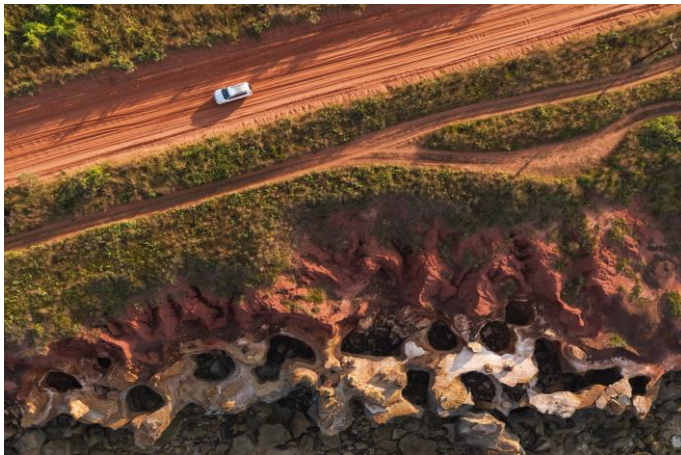
CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



INTENTION TO VISIT (IN THE NEXT 2 YEARS)

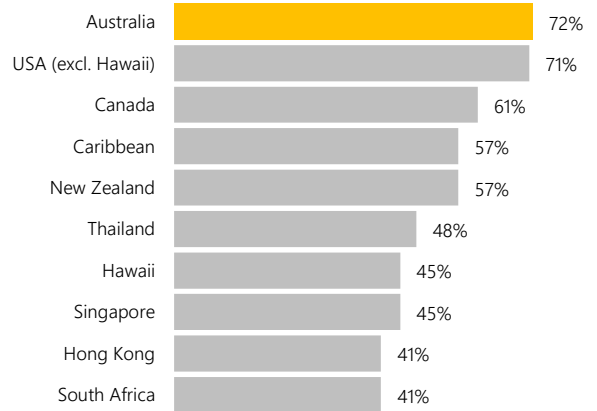


Read as: 22% of UK HVTs state Australia is their most desirable destination.



Gantheaume Point, Western Australia

AWARENESS OF HOLIDAY EXPERIENCES



DRIVERS FOR CHOOSING AUSTRALIA



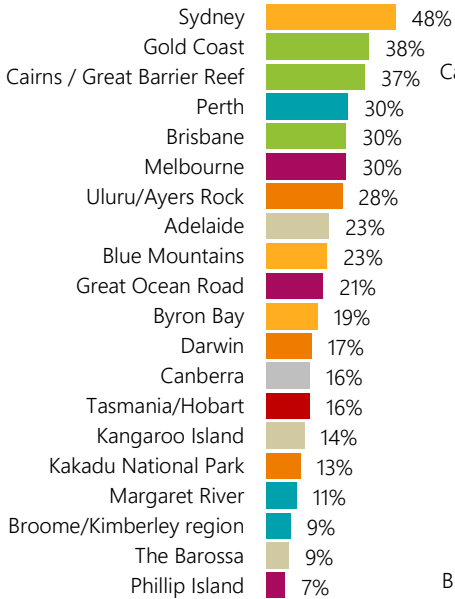
BARRIERS FOR NOT CHOOSING AUSTRALIA



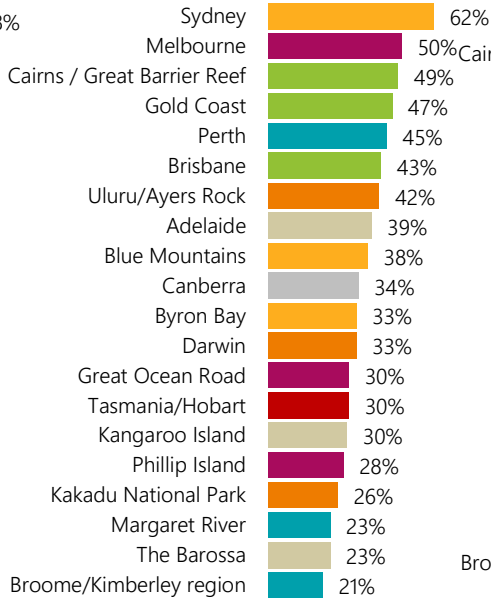
Read as: 62% of UK HVTs identify Australia as a safe and friendly place to visit as a key driver for selection.

DEMAND FOR AUSTRALIA

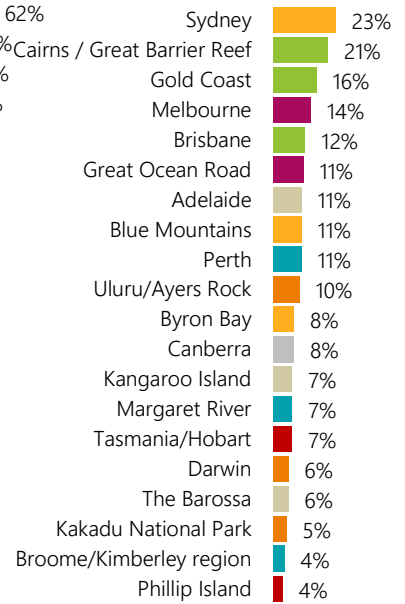
CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



AWARENESS OF EXPERIENCES WITHIN AUSTRALIAN DESTINATIONS



INTENTION TO VISIT (IN THE NEXT 2 YEARS)



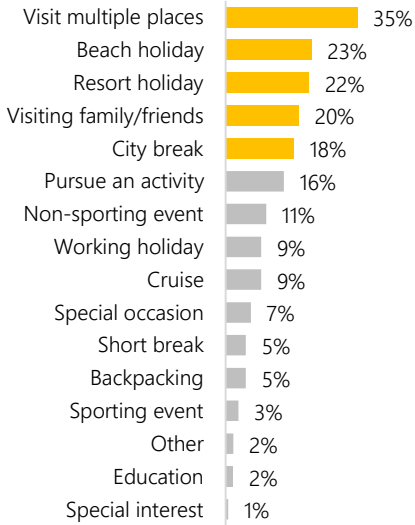
Read as: Of all UK HVTs considering Australia, 48% are considering visiting Sydney in the next 4 years.



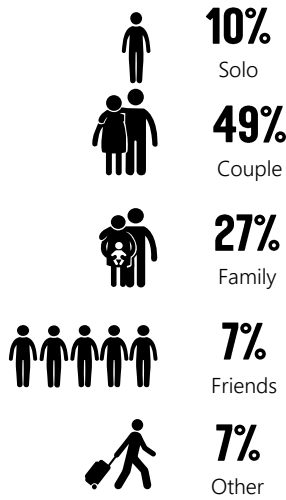
Gold Coast, Queensland

TRIP BEHAVIOUR

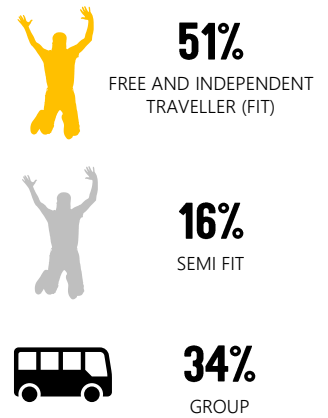
TRIP TYPE



TRAVEL PARTY

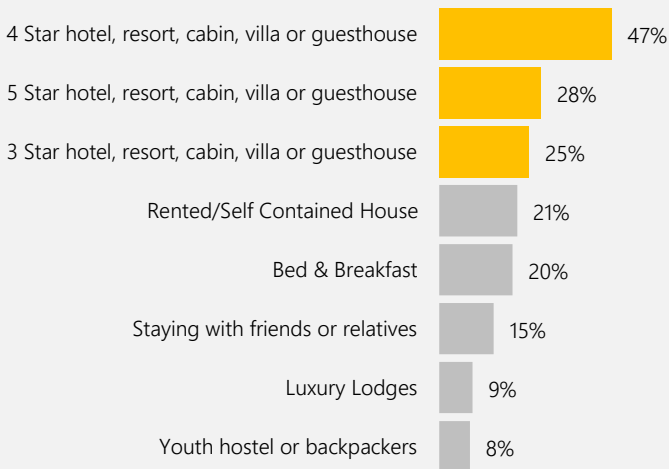


TRAVEL STYLE



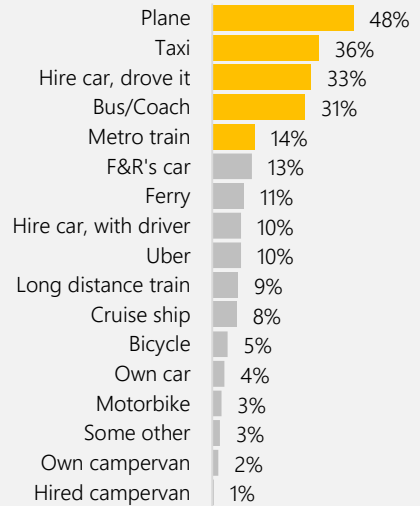
Read as: On average UK HVTs visit four places when holidaying at a destination.

ACCOMMODATION TYPE

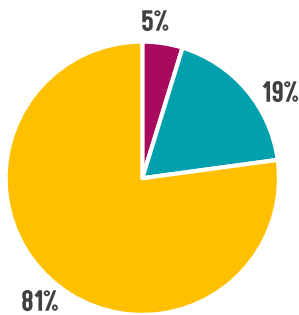


Read as: 47% of UK HVTs prefer 4-star accommodation.

TRANSPORT

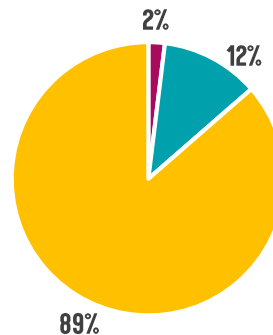


BOOKING LEAD TIME FOR ACCOMMODATION



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

BOOKING LEAD TIME FOR FLIGHTS

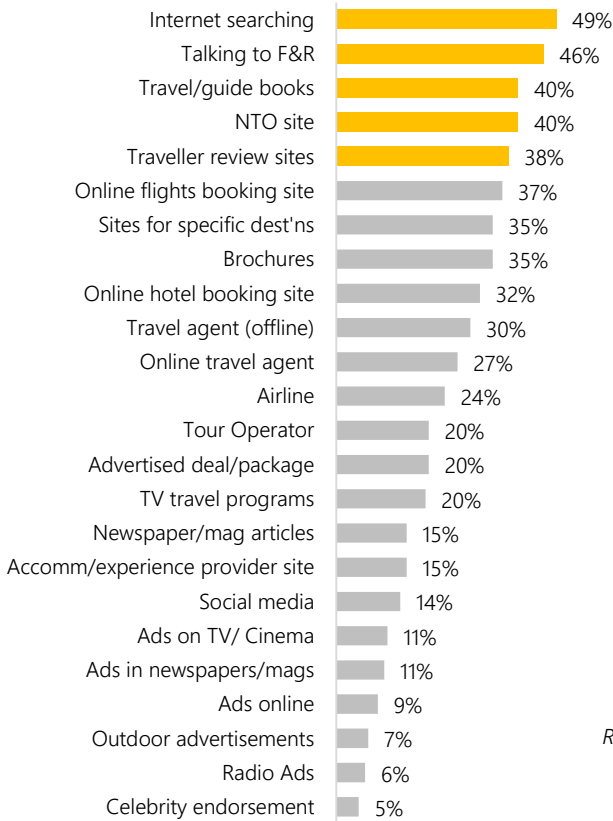


- Booked while on my trip
- Booked not long before my trip
- Booked well in advance of my trip

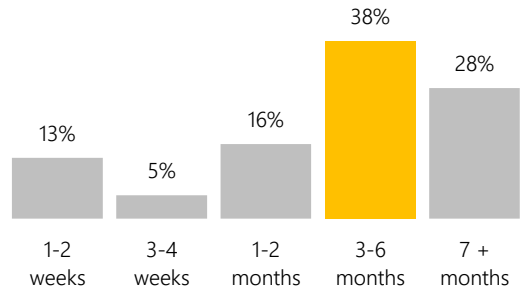
Read as 81% of UK HVTs book their accommodation well in advance of their trip.

PLANNING AND BOOKING

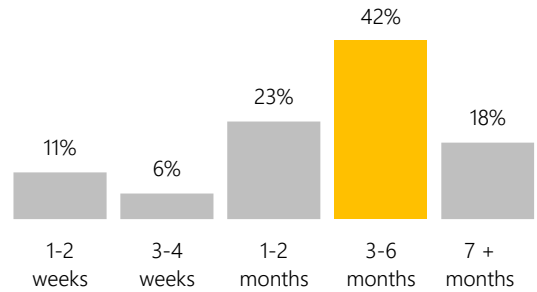
PLANNING SOURCES



DESTINATION CHOICE LEAD TIME

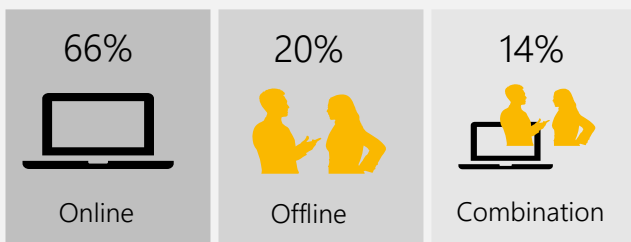


BOOKING LEAD TIME



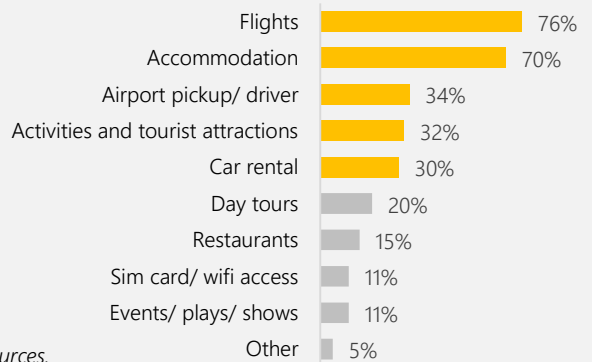
Read as: 38% of UK HVTs select a destination 3-6 months before they travel.

ONLINE VS. OFFLINE BOOKING

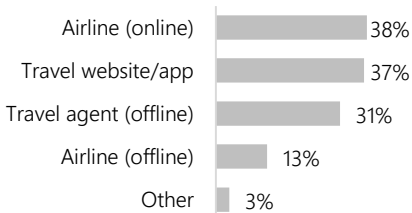


Read as: 66% of UK HVTs book online, while 20% book through offline sources.

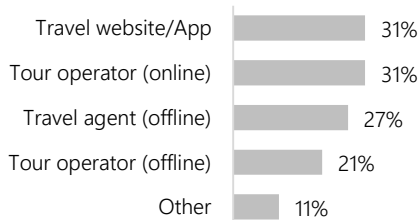
BOOKED PRIOR TO DEPARTURE



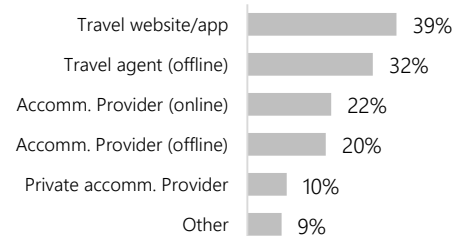
FLIGHT BOOKINGS



TOUR BOOKINGS



ACCOMMODATION BOOKINGS



Read as: 38% of UK HVTs booked flights directly through an airline website on their last trip.