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**

<table>
<thead>
<tr>
<th>Travel Long Haul</th>
<th>Preference for Australia</th>
<th>Key Drivers for Destination Choice</th>
<th>Represent High Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travels long haul (out of region) on a regular basis.</td>
<td>Consideration to visit Australia in the short or long term.</td>
<td>Food and wine, aquatic and coastal, and nature and wildlife experiences are key drivers when choosing a holiday destination.</td>
<td>Above average trip expenditure. Higher likelihood to stay longer. Higher likelihood to disperse further.</td>
</tr>
</tbody>
</table>

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.

**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

**MOOD OF THE NATION**

<table>
<thead>
<tr>
<th>Uncertain</th>
<th>Optimistic</th>
<th>Positive</th>
<th>Resilient</th>
<th>Divided</th>
<th>Progressive</th>
<th>Stressed</th>
<th>Distrusting</th>
<th>Negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>33%</td>
<td>32%</td>
<td>31%</td>
<td>27%</td>
<td>23%</td>
<td>21%</td>
<td>14%</td>
<td>11%</td>
<td>11%</td>
</tr>
</tbody>
</table>

Source: Tourism Australia’s Consumer Demand Project 2019
Read as: 59% of New Zealand HVTs state beauty and wildlife is the most important driver for destination choice.

Read as: 67% of New Zealand HVTs associate Australia as the top destination for nature and wildlife.
DEMAND FOR AUSTRALIA

MOST DESIRABLE DESTINATIONS
- Europe: 11%
- USA (excl. Hawaii): 8%
- Other South Pacific: 6%
- Hawaii: 6%
- Italy: 5%
- Maldives: 5%
- Australia: 4%
- France: 4%
- Greece: 4%
- Japan: 3%

MOST FASHIONABLE DESTINATIONS
- USA (excl. Hawaii): 44%
- Australia: 42%
- France: 31%
- Italy: 26%
- UK: 24%
- Other South Pacific: 21%
- Indonesia/ Bali: 17%
- New Zealand: 16%
- Hawaii: 15%
- Japan: 14%

CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)
- Australia: 92%
- UK: 38%
- Fiji: 32%
- France: 30%
- Italy: 30%
- USA (excl. Hawaii): 30%
- Hawaii: 28%
- Canada: 28%
- Japan: 24%
- Germany: 23%

INTENTION TO VISIT (IN THE NEXT 2 YEARS)
- Australia: 62%
- Fiji: 15%
- UK: 15%
- France: 14%
- Italy: 13%
- USA (excl. Hawaii): 11%
- Hawaii: 11%
- Japan: 11%
- Singapore: 10%

AWARENESS OF HOLIDAY EXPERIENCES
- Australia: 79%
- UK: 54%
- Fiji: 46%
- USA (excl. Hawaii): 43%
- Italy: 41%
- France: 39%
- Singapore: 37%
- Hawaii: 35%
- Other South Pacific: 35%
- Greece: 33%

DRIVERS FOR CHOOSING AUSTRALIA
- Consider it a safe & friendly place to visit: 59%
- Flights are cheap: 59%
- Have already travelled there & would like to return: 56%
- Have family & friends living there: 53%
- There are direct flights: 52%
- It is close to travel to: 51%
- Provides activities and attractions I am interested in: 38%
- A cheap destination to holiday in: 29%
- Easy to obtain Australian visa: 27%
- Consider it an exciting place to travel to: 27%

BARRIERS FOR NOT CHOOSING AUSTRALIA
- Other places I'd prefer to go: 33%
- Already been there & want to see other places: 24%
- Planned a holiday to another destination: 23%
- It is easy to put off for another time: 17%
- I don't have enough annual leave: 11%
- High cost of travelling around: 11%
- High cost of living expenses: 9%
- Expensive airfares: 7%
- I don't consider it an exciting place to travel to: 6%
- The Aus dollar makes it too expensive: 6%

Read as: 59% of New Zealand HVTs identify Australia as a destination that is safe and friendly to visit.

Read as: 92% of New Zealand HVTs state Australia is their most considered destination.

Source: Tourism Australia’s Consumer Demand Project 2019

Cradle Mountain, Tasmania
DEMAND FOR AUSTRALIA

CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)

- Sydney: 47%
- Gold Coast: 46%
- Melbourne: 44%
- Brisbane: 31%
- Cairns/Great Barrier Reef: 24%
- Perth: 20%
- Adelaide: 16%
- Tasmania/Hobart: 14%
- The Barossa: 11%
- Great Ocean Road: 10%
- Darwin: 10%
- Kakadu National Park: 10%
- Blue Mountains: 10%
- Byron Bay: 9%
- Uluru/Ayers Rock: 8%
- Margaret River: 7%
- Canberra: 7%
- Kangaroo Island: 6%
- Broome/Kimberley region: 5%
- Phillip Island: 4%

AWARENESS OF EXPERIENCES WITHIN AUSTRALIAN DESTINATIONS

- Gold Coast: 64%
- Sydney: 56%
- Melbourne: 49%
- Brisbane: 46%
- Cairns/Great Barrier Reef: 34%
- Perth: 26%
- Adelaide: 23%
- Blue Mountains: 22%
- Great Ocean Road: 20%
- Uluru/Ayers Rock: 19%
- Byron Bay: 19%
- Tasmania/Hobart: 18%
- The Barossa: 16%
- Canberra: 14%
- Margaret River: 13%
- Kakadu National Park: 12%
- Phillip Island: 12%
- Kangaroo Island: 11%
- Darwin: 11%
- Broome/Kimberley region: 10%

INTENTION TO VISIT (IN THE NEXT 2 YEARS)

- Melbourne: 23%
- Sydney: 23%
- Gold Coast: 21%
- Brisbane: 14%
- Cairns/Great Barrier Reef: 9%
- Adelaide: 6%
- Perth: 6%
- Tasmania/Hobart: 5%
- Blue Mountains: 3%
- Darwin: 3%
- Great Ocean Road: 3%
- Byron Bay: 2%
- Kakadu National Park: 2%
- The Barossa: 2%
- Canberra: 2%
- Kangaroo Island: 2%
- Margaret River: 1%
- Uluru/Ayers Rock: 1%
- Broome/Kimberley region: 1%
- Phillip Island: 1%

Read as: Of all New Zealand HVTs considering Australia, 47% are considering visiting Sydney in the next 4 years.

Source: Tourism Australia's Consumer Demand Project 2019

Casuarina Beach Lizard Island, Queensland
TRIP BEHAVIOUR

TRIP TYPE

<table>
<thead>
<tr>
<th>Trip Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visiting family &amp; friends</td>
<td>44%</td>
</tr>
<tr>
<td>Visiting multiple places</td>
<td>34%</td>
</tr>
<tr>
<td>Resort holiday</td>
<td>28%</td>
</tr>
<tr>
<td>Beach holiday</td>
<td>21%</td>
</tr>
<tr>
<td>Pursue a specific activity</td>
<td>14%</td>
</tr>
<tr>
<td>Special occasion</td>
<td>14%</td>
</tr>
<tr>
<td>City break</td>
<td>11%</td>
</tr>
<tr>
<td>Cruise</td>
<td>10%</td>
</tr>
<tr>
<td>Short break</td>
<td>8%</td>
</tr>
<tr>
<td>Working holiday</td>
<td>6%</td>
</tr>
<tr>
<td>Non-sporting event</td>
<td>5%</td>
</tr>
<tr>
<td>Sporting event</td>
<td>4%</td>
</tr>
<tr>
<td>Special interest</td>
<td>4%</td>
</tr>
<tr>
<td>Backpacking</td>
<td>2%</td>
</tr>
<tr>
<td>Education</td>
<td>2%</td>
</tr>
<tr>
<td>Other</td>
<td>6%</td>
</tr>
</tbody>
</table>

TRAVEL PARTY

- **Solo**: 10%
- **Couple**: 43%
- **Family**: 34%
- **Friends**: 8%
- **Other**: 4%

TRAVEL STYLE

- **FREE AND INDEPENDENT TRAVELLER (FIT)**: 73%
- **SEMI FIT**: 16%
- **GROUP**: 11%

ACCOMMODATION TYPE

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 Star hotel, resort, cabin, villa or guesthouse</td>
<td>48%</td>
</tr>
<tr>
<td>Staying with friends or relatives</td>
<td>33%</td>
</tr>
<tr>
<td>Rented/self contained house</td>
<td>29%</td>
</tr>
<tr>
<td>5 Star hotel, resort, cabin, villa</td>
<td>24%</td>
</tr>
<tr>
<td>3 Star hotel, resort, cabin, villa</td>
<td>21%</td>
</tr>
<tr>
<td>Standard hotel, resort, cabin, villa</td>
<td>16%</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>15%</td>
</tr>
<tr>
<td>Caravan/ campervan or camping</td>
<td>8%</td>
</tr>
<tr>
<td>Luxury Lodges</td>
<td>8%</td>
</tr>
<tr>
<td>Youth hostel or backpackers</td>
<td>4%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
</tr>
</tbody>
</table>

TRANSPORT

<table>
<thead>
<tr>
<th>Mode of Transport</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bus/coach</td>
<td>39%</td>
</tr>
<tr>
<td>Plane</td>
<td>35%</td>
</tr>
<tr>
<td>Hire car, drove it</td>
<td>34%</td>
</tr>
<tr>
<td>Taxi</td>
<td>33%</td>
</tr>
<tr>
<td>Metro train</td>
<td>29%</td>
</tr>
<tr>
<td>Friend or relatives car</td>
<td>26%</td>
</tr>
<tr>
<td>Ferry</td>
<td>18%</td>
</tr>
<tr>
<td>Long distance train</td>
<td>14%</td>
</tr>
<tr>
<td>Uber</td>
<td>11%</td>
</tr>
<tr>
<td>Hire car, with driver</td>
<td>10%</td>
</tr>
<tr>
<td>Cruise ship</td>
<td>7%</td>
</tr>
<tr>
<td>Bicycle</td>
<td>4%</td>
</tr>
<tr>
<td>Own car</td>
<td>4%</td>
</tr>
<tr>
<td>Motorbike</td>
<td>3%</td>
</tr>
<tr>
<td>Own car</td>
<td>2%</td>
</tr>
</tbody>
</table>

BOOKING LEAD TIME FOR ACCOMMODATION

- 73% Booked well in advance of my trip
- 26% Booked not long before my trip
- 12% Booked while on my trip

BOOKING LEAD TIME FOR FLIGHTS

- 91% Booked well in advance of my trip
- 2% Booked not long before my trip
- 9% Booked while on my trip

Read: 44% of New Zealand HVTs stated their last holiday was to visit family and/or friends.

Read: 48% of New Zealand HVTs prefer 4-star accommodation.

Read: 73% of New Zealand HVTs book accommodation well in advance of their trip.

Source: Tourism Australia’s Consumer Demand Project 2019
**PLANNING AND BOOKING**

**PLANNING SOURCES**

- Been there before: 59%
- Internet searching: 57%
- Talking to friends & relatives: 39%
- Online flights booking site: 35%
- Online hotel booking site: 33%
- Travel agent (offline): 31%
- Traveller review sites: 30%
- Destination specific site: 22%
- Airline: 21%
- Accommodation/experience provider: 17%
- Brochures: 17%
- Travel/guide books: 15%
- Videos on internet: 15%
- Any other travel site: 14%
- Online travel agent: 13%
- Social media: 13%
- Advertised deal/package: 12%
- National Tourism Org. site: 11%
- TV travel programs: 10%
- Ads online: 8%
- Tour operator: 8%
- Newspaper/mag articles: 8%
- Movies/books: 5%
- Ads in newspaper/mags: 5%
- Ads on TV/Cinema: 5%

**DESTINATION CHOICE LEAD TIME**

- 1-2 weeks: 4%
- 3-4 weeks: 4%
- 1-2 months: 13%
- 3-6 months: 51%
- 7+ months: 27%

**BOOKING LEAD TIME**

- 1-2 weeks: 4%
- 3-4 weeks: 5%
- 1-2 months: 20%
- 3-6 months: 49%
- 7+ months: 22%

Read as: 51% of New Zealand HVTs select a destination 3-6 months before they travel.

**ONLINE VS. OFFLINE BOOKING**

- Online: 56%
- Offline: 18%
- Combination: 27%

Read as: 56% of New Zealand HVTs book online, while 18% book through offline sources.

**FLIGHT BOOKINGS**

- Airline (online): 44%
- Travel agent (offline): 34%
- Travel website/app: 26%
- Airline (offline): 10%

**TOUR BOOKINGS**

- Tour operator (online): 35%
- Other: 24%
- Travel agent (offline): 20%
- Travel agent (offline): 18%
- Travel website/app: 18%

**ACCOMMODATION BOOKINGS**

- Travel website/app: 31%
- Accomm. Provider (online): 28%
- Travel agent (offline): 24%
- Other: 15%
- Private accomm. Provider: 13%
- Accomm. Provider (offline): 12%

Read as: 44% of New Zealand HVTs booked flights directly through an airline website on their last trip.

Read as: 35% booked their tours online.

Read as: 18% booked their accommodation online.

Source: Tourism Australia’s Consumer Demand Project 2019