

HIGH VALUE TRAVELLER FACT SHEET 2020

INDONESIA

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.

 **1.2M**
High Value Travellers in Indonesia

of which **0.5M**
are considering visiting Australia in the next four years

and a further **0.7M**
not considering Australia in the next four years

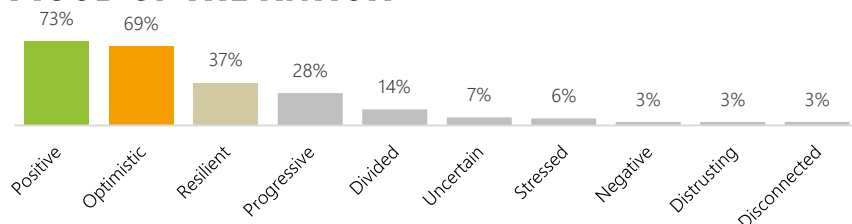
DID YOU KNOW?


-  **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 Indonesian long haul travel market

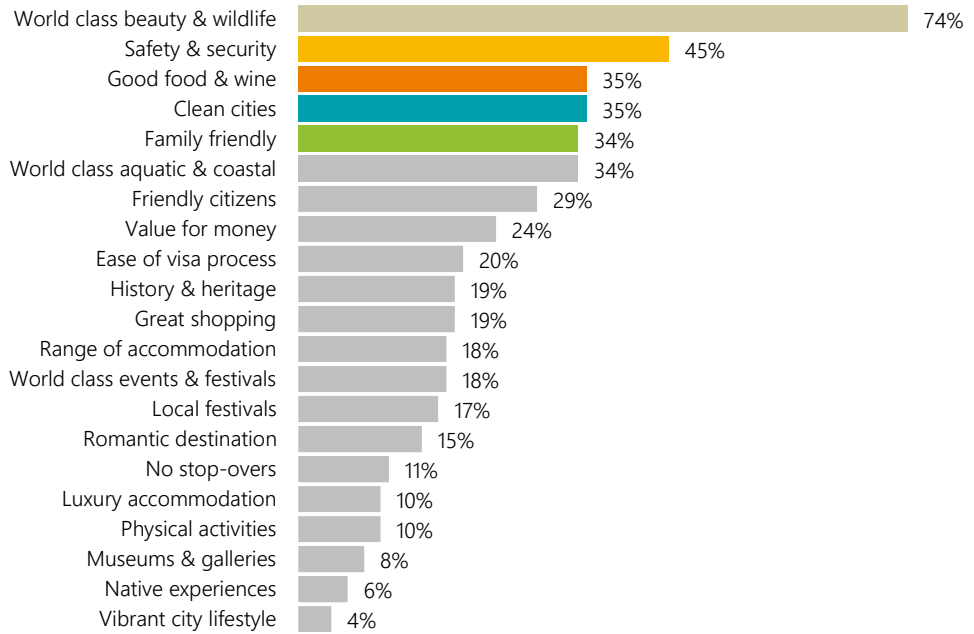
 Staying an average **7 NIGHTS**

MOOD OF THE NATION



 Spending **2-3X**
more than the average traveller₁

DRIVERS OF DESTINATION CHOICE

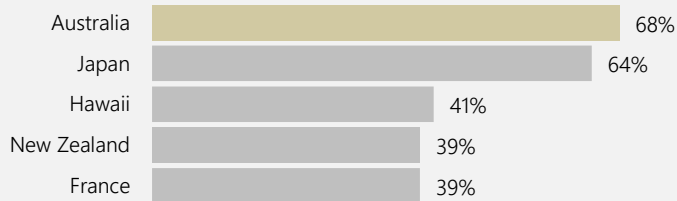


Read as: 74% of Indonesian HVTs state world-class beauty and wildlife is the most important driver for destination choice.

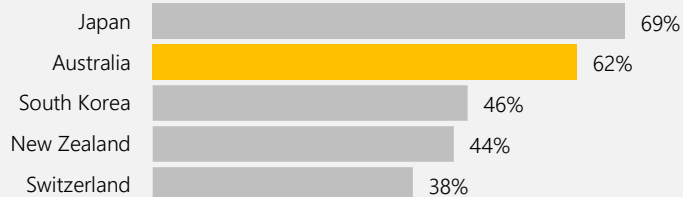
AUSTRALIA'S ASSOCIATION TO DRIVERS OF DESTINATION CHOICE



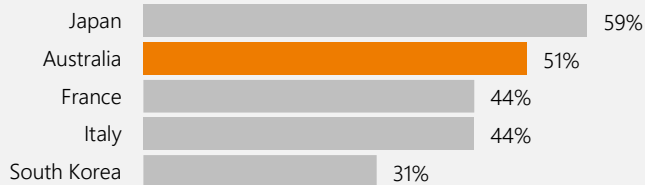
NATURE & WILDLIFE



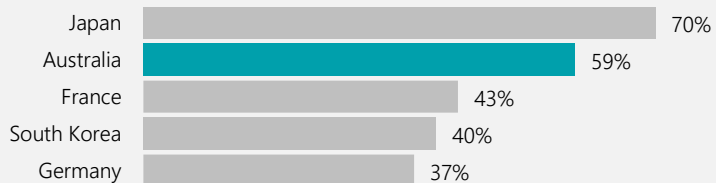
SAFETY & SECURITY



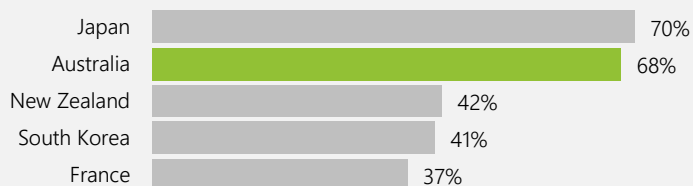
GOOD FOOD & WINE



CLEAN CITIES



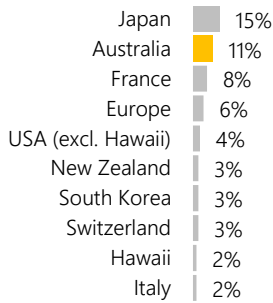
FAMILY FRIENDLY



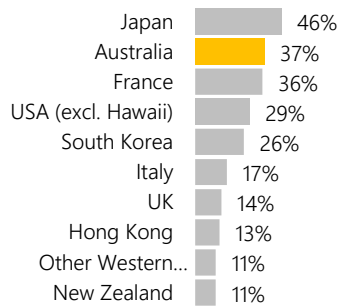
Read as: 68% of Indonesian HVTs associate Australia as the top destination for world class beauty and wildlife.

DEMAND FOR AUSTRALIA

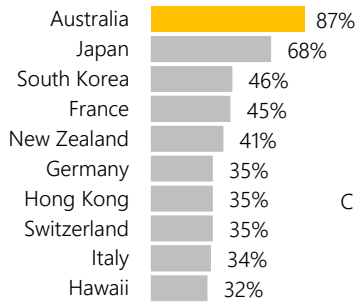
MOST DESIRABLE DESTINATIONS



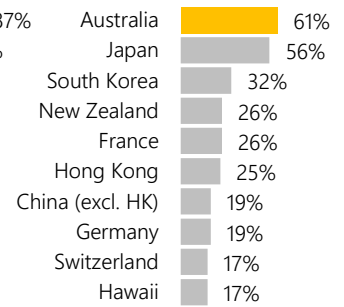
MOST FASHIONABLE DESTINATIONS



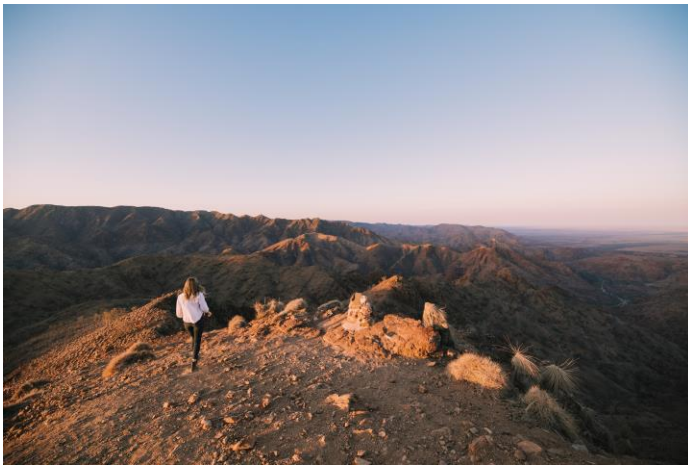
CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



INTENTION TO VISIT (IN THE NEXT 2 YEARS)

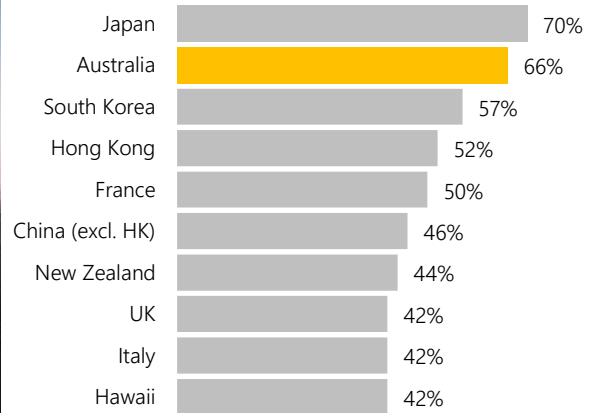


Read as: 87% of Indonesian HVTs state Australia is their most considered destination.



Flinders Ranges, South Australia

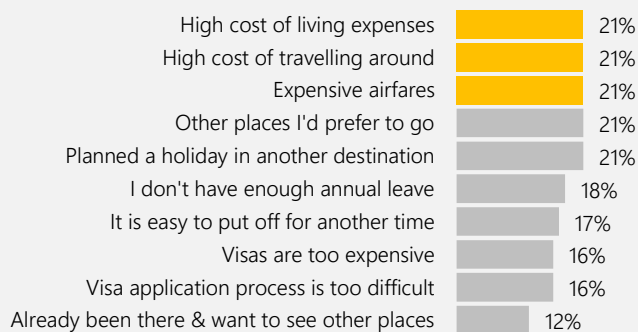
AWARENESS OF HOLIDAY EXPERIENCES



DRIVERS FOR CHOOSING AUSTRALIA



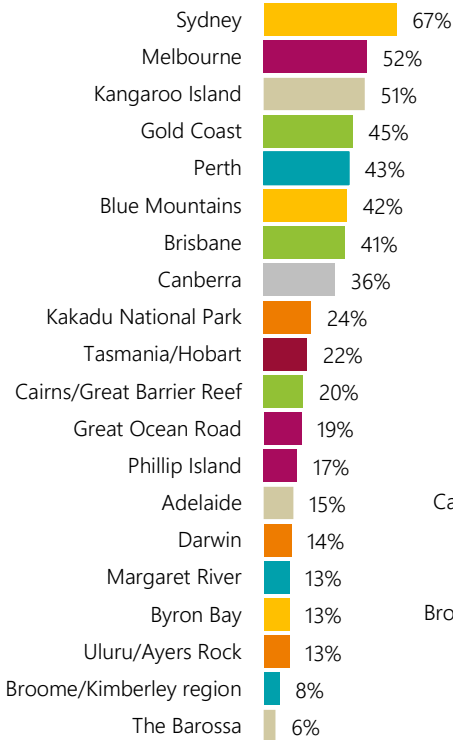
BARRIERS FOR NOT CHOOSING AUSTRALIA



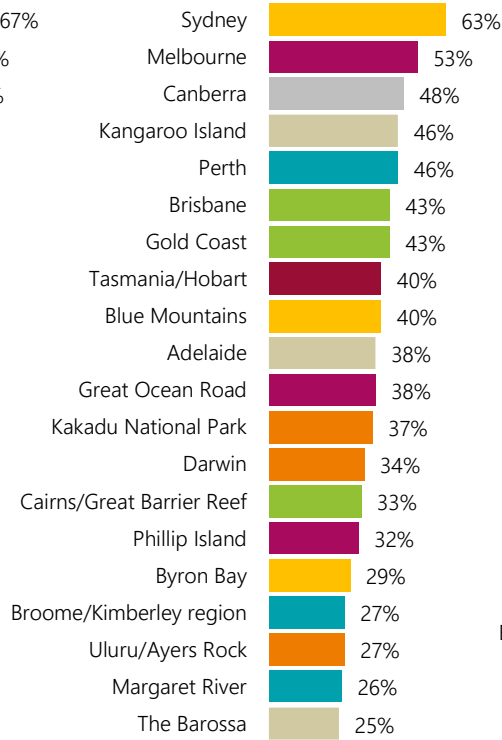
Read as: 72% of Indonesian HVTs identify Australia as a destination that is an exciting place to travel to.

DEMAND FOR AUSTRALIA

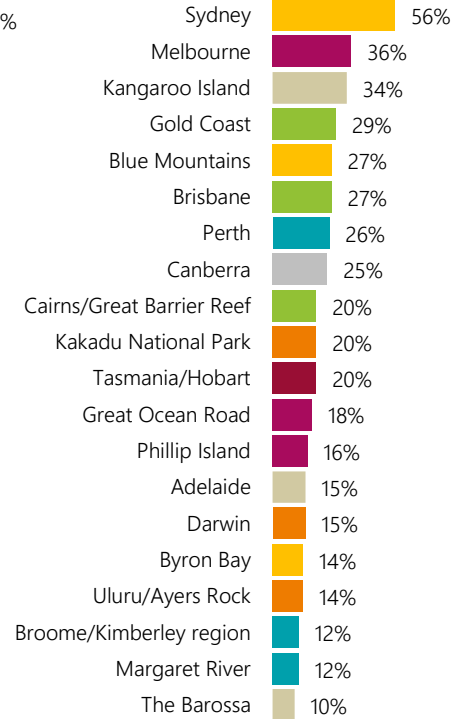
CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



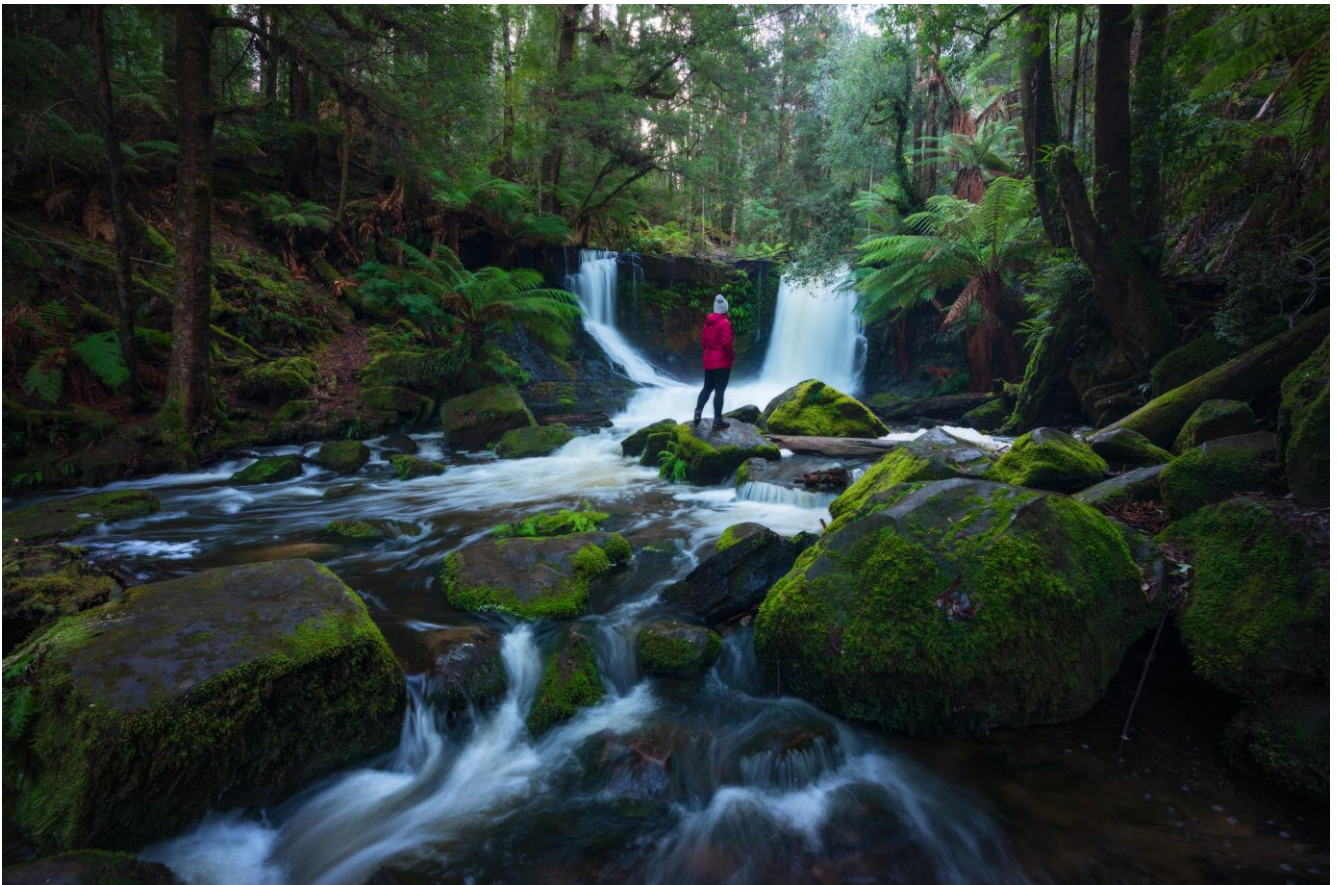
AWARENESS OF EXPERIENCES WITHIN AUSTRALIAN DESTINATIONS



INTENTION TO VISIT (IN THE NEXT 2 YEARS)



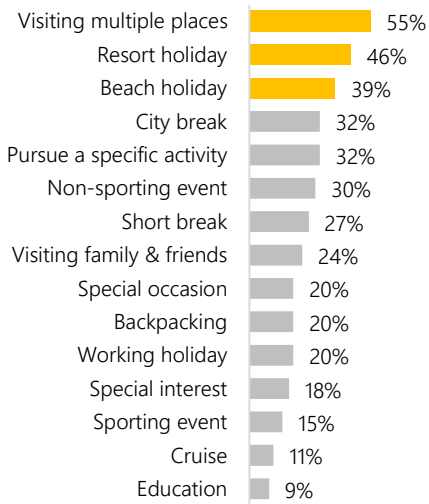
Read as: Of all Indonesian HVTs considering Australia, 67% are considering visiting Sydney in the next 4 years.



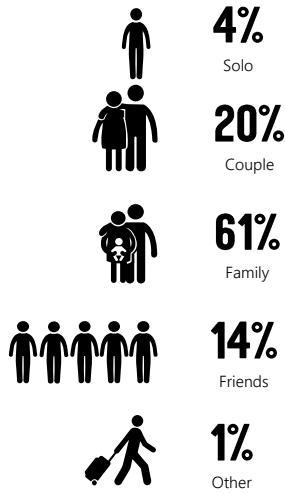
Horseshoe Falls, Tasmania

TRIP BEHAVIOUR

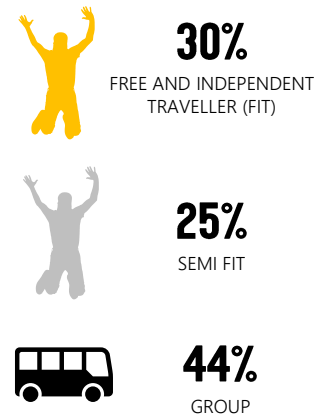
TRIP TYPE



TRAVEL PARTY

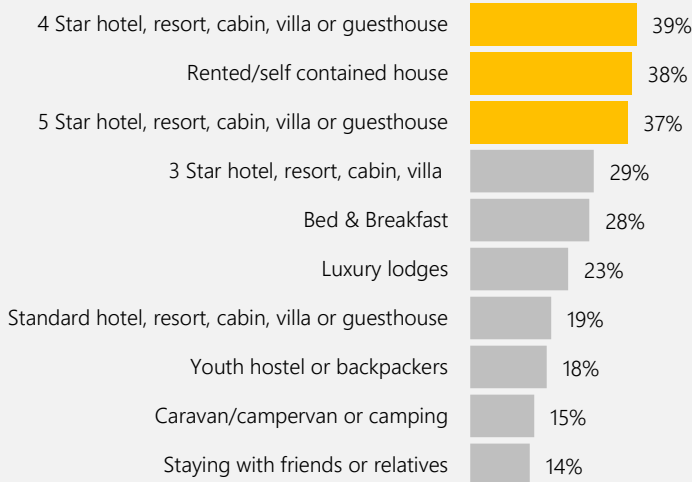


TRAVEL STYLE

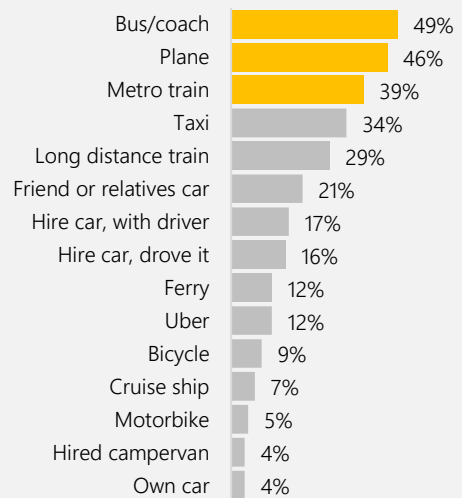


Read as: 55% of Indonesian HVTs stated their last holiday was to visit multiple places.

ACCOMMODATION TYPE

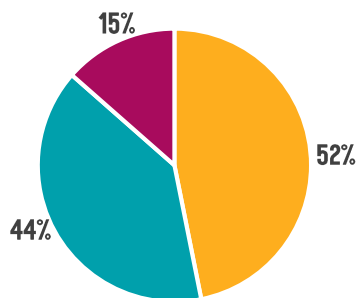


TRANSPORT



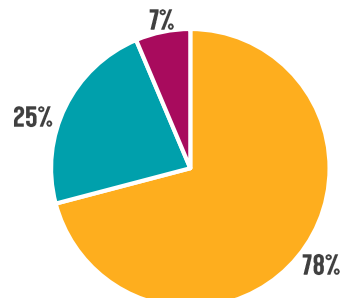
Read as: 39% of Indonesian HVTs prefer 4-star accommodation.

BOOKING LEAD TIME FOR ACCOMMODATION



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

BOOKING LEAD TIME FOR FLIGHTS

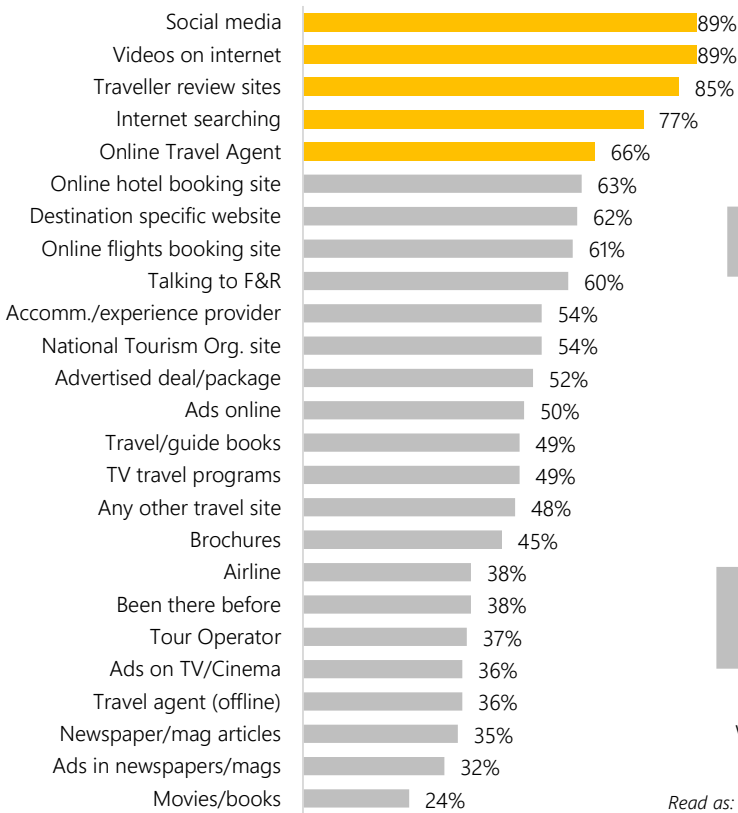


- Booked well in advance of my trip
- Booked not long before my trip
- Booked while on my trip

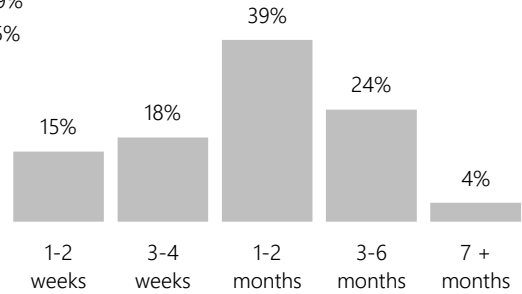
Read as 52% of Indonesian HVTs booked accommodation well in advance of their trip.

PLANNING AND BOOKING

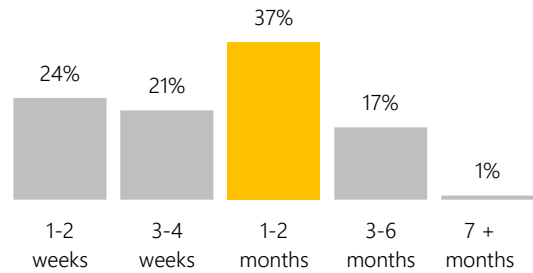
PLANNING SOURCES



DESTINATION CHOICE LEAD TIME

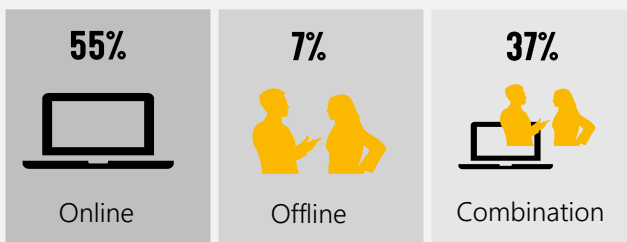


BOOKING LEAD TIME



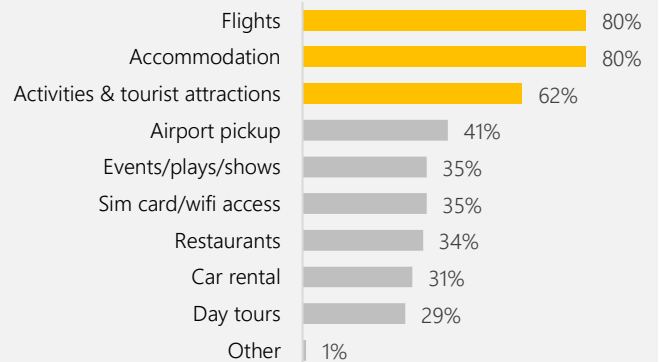
Read as: 39% of Indonesian HVTs select a destination 1-2 months before they travel.

ONLINE VS. OFFLINE BOOKING

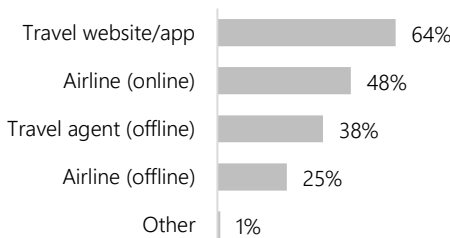


Read as: 55% of Indonesian HVTs book online, while 7% book through offline sources.

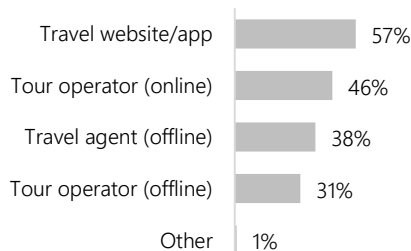
BOOKED PRIOR TO DEPARTURE



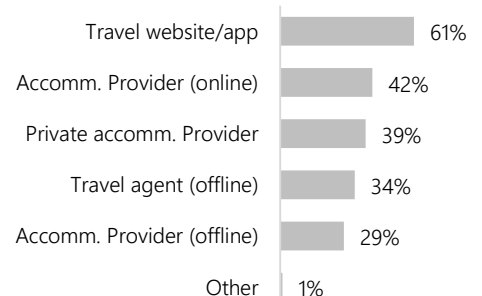
FLIGHT BOOKINGS



TOUR BOOKINGS



ACCOMODATION BOOKINGS



Read as: 64% of Indonesian HVTs booked flights through an airline website on their last trip.