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.

**DID YOU KNOW?**
- 95% Prefer to holiday where they can see nature and be in a natural setting
- 94% Like to get a taste for the local cuisine when travelling
- 94% Travel to enrich their knowledge of the world
- 93% Travel to rejuvenate the mind, body and soul
- 92% Like authentic holidays where they can experience the local culture

**MOOD OF THE NATION**

<table>
<thead>
<tr>
<th>Stressed</th>
<th>Happy</th>
<th>Uncertain</th>
<th>Divided</th>
<th>Positive</th>
<th>Disturbing</th>
<th>Optimistic</th>
<th>Progressive</th>
<th>Disconnected</th>
</tr>
</thead>
<tbody>
<tr>
<td>35%</td>
<td>33%</td>
<td>31%</td>
<td>30%</td>
<td>29%</td>
<td>20%</td>
<td>16%</td>
<td>14%</td>
<td>10%</td>
</tr>
</tbody>
</table>

Source: Tourism Australia’s Consumer Demand Project 2019
DRIVERS OF DESTINATION CHOICE

World class beauty & wildlife: 63%
Safety & security: 62%
Good food & wine: 57%
Clean cities: 35%
Friendly citizens: 31%
Family friendly: 28%
History & heritage: 23%
World class aquatic & coastal: 21%
Range of accommodation: 21%
Great shopping: 19%
Value for money: 18%
No stop-overs: 16%
Ease of visa process: 15%
Vibrant city lifestyle: 14%
Museums & galleries: 13%
Local festivals: 12%
Romantic destination: 9%
Physical activities: 9%
World class events/festivals: 9%
Native experiences: 8%
Luxury accommodation: 7%

Source: Tourism Australia’s Consumer Demand Project 2019

AUSTRALIA’S ASSOCIATION TO DRIVERS OF DESTINATION CHOICE

Read as: 63% of Hong Kong HVTs state beauty and wildlife is the most important driver for destination choice.

Read as: 65% of Hong Kong HVTs associate Australia as the top destination for nature and wildlife.
**DEMAND FOR AUSTRALIA**

### MOST DESIRABLE DESTINATIONS

- **Australia**: 9%
- **Maldives**: 7%
- **Switzerland**: 7%
- **Europe**: 4%
- **New Zealand**: 4%
- **Scandinavia**: 4%
- **Greece**: 2%
- **Dubai**: 2%
- **France**: 2%
- **Hawaii**: 2%

Read as: 9% of Hong Kong HVTs state Australia is their most desirable destination.

### MOST FASHIONABLE DESTINATIONS

- **France**: 26%
- **Australia**: 25%
- **Italy**: 21%
- **Scandinavia**: 20%
- **USA (excl. Hawaii)**: 19%
- **UK**: 19%
- **Thailand**: 15%
- **New Zealand**: 10%
- **Switzerland**: 7%
- **Canada**: 5%

### CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>48%</td>
</tr>
<tr>
<td>Thailand</td>
<td>45%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>45%</td>
</tr>
<tr>
<td>France</td>
<td>41%</td>
</tr>
<tr>
<td>UK</td>
<td>39%</td>
</tr>
<tr>
<td>Singapore</td>
<td>38%</td>
</tr>
<tr>
<td>Canada</td>
<td>35%</td>
</tr>
<tr>
<td>Germany</td>
<td>34%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>33%</td>
</tr>
<tr>
<td>Italy</td>
<td>32%</td>
</tr>
</tbody>
</table>

### INTENTION TO VISIT (IN THE NEXT 2 YEARS)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>54%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>25%</td>
</tr>
<tr>
<td>Thailand</td>
<td>24%</td>
</tr>
<tr>
<td>UK</td>
<td>18%</td>
</tr>
<tr>
<td>Singapore</td>
<td>18%</td>
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<tr>
<td>France</td>
<td>17%</td>
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<tr>
<td>Canada</td>
<td>15%</td>
</tr>
<tr>
<td>Italy</td>
<td>13%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>12%</td>
</tr>
<tr>
<td>Germany</td>
<td>12%</td>
</tr>
</tbody>
</table>

### AWARENESS OF HOLIDAY EXPERIENCES

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>66%</td>
</tr>
<tr>
<td>UK</td>
<td>58%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>53%</td>
</tr>
<tr>
<td>Thailand</td>
<td>50%</td>
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<tr>
<td>Italy</td>
<td>49%</td>
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<tr>
<td>New Zealand</td>
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<td>Singapore</td>
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<td>Canada</td>
<td>45%</td>
</tr>
<tr>
<td>Germany</td>
<td>45%</td>
</tr>
</tbody>
</table>

### DRIVERS FOR CHOOSING AUSTRALIA

- Consider it a safe and friendly place to visit: 59%
- Provides activities and attractions I’m interested in: 45%
- Consider it an exciting place to travel to: 37%
- Have already travelled there & would like to return: 36%
- Have heard good things from friends and family: 30%
- There are direct flights: 28%
- Have family and friends living there: 27%
- Always been somewhere I’ve dreamt of going: 24%
- Easy to obtain an Australian visa: 23%
- Flights are cheap: 18%

### BARRIERS FOR NOT CHOOSING AUSTRALIA

- High cost of travelling around: 26%
- Expensive airfares: 25%
- I don’t have enough annual leave: 20%
- High cost of living expenses: 17%
- Other places I’d prefer to go: 15%
- Planned a holiday to another destination: 15%
- Already been there & want to see other places: 15%
- It is too far to travel: 12%
- It is easy to put off for another time: 11%
- The Australian dollar makes it too expensive: 11%

Read as: 59% of Hong Kong HVTs identify Australia as a safe and friendly destination to travel to.

Source: Tourism Australia's Consumer Demand Project 2019
Read as: Of all Hong Kong HVTs considering Australia, 54% are considering visiting the Gold Coast in the next 4 years.

Source: Tourism Australia’s Consumer Demand Project 2019
## TRIP BEHAVIOUR

### TRIP TYPE

- City break: 43%
- Resort holiday: 41%
- Travel to multiple places: 29%
- Visiting family & friends: 22%
- Beach holiday: 20%
- Short break: 14%
- Special interest: 11%
- Non-sporting event: 10%
- Pursue a specific activity: 10%
- Backpacking: 6%
- Sporting event: 6%
- Working holiday: 6%
- Cruise: 5%
- Education: 4%
- Special interest: 3%
- Other: 2%

Read as: 43% of Hong Kong HVTs stated their last holiday was a city break.

### TRAVEL PARTY

- Solo: 9%
- Couple: 36%
- Family: 38%
- Friends: 14%
- Other: 4%

### TRAVEL STYLE

- FREE AND INDEPENDENT TRAVELLER (FIT): 38%
- SEMI FIT: 28%
- GROUP: 34%

### ACCOMODATION TYPE

- 4 Star hotel, resort, cabin, villa or guesthouse: 47%
- 5 star hotel, resort, cabin, villa or guesthouse: 39%
- 3 Star hotel, resort, cabin, villa: 20%
- Rented/self contained house: 19%
- Bed & breakfast: 17%
- Standard hotel, resort, cabin, villa: 13%
- Luxury lodges: 11%
- Staying with friends or relatives: 11%

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

### TRANSPORT

- Plane: 41%
- Bus/coach: 35%
- Taxi: 34%
- Metro train: 31%
- Long distance train: 16%
- Hire car, with driver: 16%
- Hire car, drove it: 13%
- Friend or relatives car: 13%
- Uber: 10%
- Ferry: 7%
- Hired campervan: 4%
- Cruise ship: 3%
- Own car: 3%
- Motorbike: 3%
- Bicycle: 2%

### BOOKING LEAD TIME FOR ACCOMMODATION

- Booked well in advance of my trip: 72%
- Booked not long before my trip: 29%
- Booked while on my trip: 1%

Read as: 72% of Hong Kong HVTs travelled by plane on their last holiday.

### BOOKING LEAD TIME FOR FLIGHTS

- Booked well in advance of my trip: 83%
- Booked not long before my trip: 18%
- Booked while on my trip: 1%

Read as: 72% of Hong Kong HVTs travelled by plane on their last holiday.

Source: Tourism Australia’s Consumer Demand Project 2019
PLANNING SOURCES

- Online flights booking site: 61%
- Online hotel booking site: 59%
- Travel/guide books: 56%
- Internet searching: 47%
- National Tourism Org. website: 43%
- Traveller review sites: 39%
- Social media: 38%
- Online travel agent: 36%
- Talking to friends & relatives: 33%
- Any other travel site: 30%
- Brochures: 30%
- Ads online: 29%
- Airline: 29%
- TV travel programs: 27%
- Videos on the internet: 27%
- Travel agent (off-line): 26%
- Been there before: 24%
- Newspaper/mag articles: 24%
- Destination specific website: 23%
- Ads in newspapers/mags: 22%
- Accomm./experience provider site: 18%
- Movies/books: 15%
- Ads on TV/Cinema: 13%
- Advertised deal package: 10%
- Tour Operator: 10%

DESTINATION CHOICE LEAD TIME

- 1-2 months: 42%
- 3-6 months: 38%
- 7+ months: 9%
- 1-2 weeks: 3%
- 3-4 weeks: 8%
- 3-4 months: 9%
- 7+ months: 6%

BOOKING LEAD TIME

- 1-2 weeks: 4%
- 3-4 weeks: 8%
- 1-2 months: 47%
- 3-6 months: 34%
- 7+ months: 6%

ONLINE VS. OFFLINE BOOKING

- Online: 68%
- Offline: 13%
- Combination: 19%

BOOKED PRIOR TO DEPARTURE

- Flights: 79%
- Accommodation: 78%
- Sim card/wifi access: 34%
- Activities & tourist attractions: 33%
- Car rental: 27%
- Restaurants: 27%
- Airport pickup: 24%
- Day tours: 24%
- Events/plays/shows: 12%
- Other: 0%

FLIGHT BOOKINGS

- Travel website/app: 56%
- Airline (online): 37%
- Travel agent (offline): 24%
- Airline (offline): 15%
- Other: 2%

TOUR BOOKINGS

- Travel website/app: 48%
- Tour operator (online): 32%
- Travel agent (offline): 25%
- Tour operator (offline): 15%
- Other: 3%

ACCOMMODATION BOOKINGS

- Travel website/app: 56%
- Accomm. Provider (online): 23%
- Travel agent (offline): 23%
- Private accomm. Provider: 18%
- Accomm. Provider (offline): 10%
- Other: 2%

Read as: 68% of Hong Kong HVTs book online, while 13% book through offline sources.

Read as: 42% of Hong Kong HVTs select a destination 1-2 months before they travel.

Read as: 56% of Hong Kong HVTs booked flights through a travel website or app.

Source: Tourism Australia's Consumer Demand Project 2019